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AUTHOR Mata, Robert L.; Garcia, Richard L.
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ABSTRACT

Intended to provide current or potential project principals/directors with the basic knowledge, skills, abilities, and sensitivities needed to manage a summer migrant school project in the local educational setting, this module provides instruction in the project management areas of planning, preparation, control, and termination. The module consists of 12 instructional, individualized management instructions and evaluations. Each lesson contains an introduction, exercises, management instructions, and steps for evaluation. Grouped into four phases according to the project's life-span (planning, preparation, operational control, and termination), the lessons cover an introduction to project management, project definition, development of a work flow, time estimation, resource estimation and scheduling, project start-up, project information system, project operations (monitoring and control), problem-solving through management action, implementation of changes in project operations, and project termination. A glossary of project management terms and suggestions for tasks identification are included. The module concludes with "noteworthy" information for the following program components: reading, mathematics, career education, music, arts/crafts, medical/dental, food services, physical education, recreation, special education, English as a Second Language, transportation, identification and recruitment, administrative details, parent involvement, and community coordination. (NQA)

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SUMMER PRINCIPALS'/DIRECTORS' ORIENTATION

TRAINING MODULE

TITLE I ESEA MIGRANT EDUCATION

PREPARED BY:

COLORADO MIGRANT EDUCATION RESOURCE CENTER (CoMERC)

830 SOUTH LINCOLN

LONGMONT, COLORADO 80501

ROBERT L. MATA, STAFF DEVELOPMENT

RICHARD L. GARCIA, DIRECTOR

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MARCH, 1981

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EPMIS Project Management Basic Principles
by C. Peter Cummings and Desmond L. Cook

Principals'/Directors' Orientation
1981 Summer Migrant Education
Falcon Inn, Monument, CO 80132
April 20-21, 1981

AGENDA

April 20, 1981

- | | |
|----------------------------------|--|
| 8:00 - 8:30 | - OPENING |
| | - PREREQUISITES TO ORIENTATION |
| | : INTRODUCTION OF RESOURCE - CONSULTANTS |
| | : TEAM-DECISION ON FORMAT FOR ORIENTATION
SESSION |
| | : GUIDELINES FOR EFFECTIVE WORK ENVIRONMENT |
| 8:30 - 10:00 | - BEGIN LESSONS |
| 10:00 - 10:15 | - BREAK |
| 10:15 - 12:00 | - CONTINUE LESSONS |
| 11:45
~~12:00~~ - 1:00 | - LUNCH |
| 1:00 - 3:00 | - CONTINUE LESSONS |
| 3:00 - 3:15 | - BREAK |
| 3:15 - 4:45 | - CONTINUE LESSONS |
| 4:45 - 5:00 | - REVIEW/UPDATE SESSION |

April 21, 1981

- | | |
|---------------|---------------------------|
| 8:00 - 8:15 | - QUESTION/ANSWER SESSION |
| 8:15 - 10:00 | - CONTINUE LESSONS |
| 10:00 - 10:15 | - BREAK |
| 10:15 - 12:00 | - CONTINUE LESSONS |
| 12:00 - 1:00 | - LUNCH |
| 1:00 - 3:00 | - CONTINUE LESSONS |
| 3:00 - 3:15 | - BREAK |
| 3:15 - 4:15 | - CONTINUE LESSONS |
| 4:15 - 5:00 | - WRAP-UP |

TEAM-DECISION ON SESSION FORMAT
PRINCIPALS'/DIRECTORS' ORIENTATION

April 20-21, 1981

A. _____ WHOLE-GROUP LEARNING

FORMAT:

- lesson-by-lesson coverage involving all participants at the same time
- pre-determined time-completion standards
- resource-consultant utilization on one-time basis/lesson

ADVANTAGES:

- everyone learning at same time
- consistent explanation
- consistent level of activity completion

DISADVANTAGES:

- minimum "credit" for experience in participants
- usually establishes inflexible time limits to complete lesson activity(ies).
- general, one-shot use of resource-consultants

B. _____ SELF-PACED INDIVIDUALIZED LEARNING

FORMAT:

- individual lesson-by-lesson coverage by participants
- "recommended" time-completion standards
- personal use of resource-consultants upon request

ADVANTAGES:

- allows for better utilization of previous experience of participants
- flexibility in completing lesson activity(ies)
- use of resource-consultants based on individual project needs

DISADVANTAGES:

- could cause "incomplete" activity(ies) due to lack of experience in self-pacing
- may limit communication between participating teams
- has tendency to increase noise level

C. _____

ALTERNATIVE LEARNING FORMAT

FORMAT: _____

ADVANTAGES: _____

DISADVANTAGES: _____

GUIDELINES FOR EFFECTIVE WORK INVOLVEMENT

P/D ORIENTATION

APRIL 20-21, 1981

As this will be an extensive (and intensive) learning opportunity for you, we are suggesting the following "considerations" to ensure your satisfaction while at the P/D Orientation Sessions.

PROJECT TEAMS:

- designate a work space/area for your team so that your materials will remain "close-at-hand" throughout the sessions.
- allow sufficient room at your work space/area for resource-consultants (when needed).
- consider proximity to other teams in regards to activity work (noise, materials, etc.).
- limit your "breaks" according to scheduled times (excludes "necessities").
- you may wish to be considered as a "resource-consultant" and lend your experience to other project teams during the sessions.

RESOURCE-CONSULTANTS:

- designate a work/display area for the sessions. You may wish to work with project teams at their tables (when requested).
- you will need to team with another consultant in order to share the training handbook (please turn in the handbook at the end of the day on 4/21).
- your assistance is on a requested basis (at this time) by the project teams. This may open up some "free time" for you to do other things, but please keep in mind that we can't forecast when the project teams will need you.
- if you establish a time when more than one project team will be getting together to do a task, please write the time, location, and participating projects on the newsprint which will be provided at the sessions.
- please do not distract the teams or take them away from the task at hand.

(over)

ALL PARTICIPANTS AND RESOURCE-CONSULTANTS:

- please observe smoking and non-smoking areas.
- please limit your activities and conversations to the tasks at hand while in the work/space areas. All other conversations should be held elsewhere.
- please observe starting and ending times for the sessions, breaks, lunches, etc..
- please let CoMERC know if you have any concerns or additional requests.

THANKS AGAIN FOR COMING!!! WE'RE GLAD TO SEE YOU'RE HERE!!!

SUMMER PRINCIPALS'/DIRECTORS' ORIENTATION TRAINING MODULE

OVERVIEW

MODULE GOALS

It is the purpose of this training module to provide current or potential project principals/directors with the basic knowledge, skills, abilities and sensitivities needed to manage a summer school project in the local educational setting. This module will provide instruction in the project management areas of planning, preparation, control, and termination. The goals of this module are listed below.

In planning, the participant should be able to do the following:

- define a project and create a work break-down structure
- develop a work flow
- estimate time for work activities and develop a schedule
- estimate resources needed
- be involved with and/or have knowledge of budget and expenditure plans

In preparation, the participant should be able to do the following:

- start-up a project
- organize a project
- create a management information system

In control, the participant should be able to do the following:

- develop a reporting system
- identify problems and their causes
- solve problems through decision making
- implement the decisions made

In termination, the participant should be able to do the following:

- terminate a project

MODULE ELEMENTS

The Summer Principals'/Directors' Orientation Training Module consists of twelve instructional, individualized management instructions and evaluations. Each lesson in the module contains an introduction, exercises, management instructions, and steps for evaluation. The lessons are grouped into four phases according to the life-span of the project. A description of the content presentation of each lesson follows in abstract form.

Introduction

Lesson 1 - Introduction to Project Management

An orientation to the module is provided by identifying the lessons connected with the four phases of the life cycle of a project. The components constituting the lessons are described and the term "summer project" is defined and described in some detail. Project management is explained and the functions of management are described. The role and some of the duties of a project manager are identified.

Project Planning Phase

Lesson 2 - Project Definition

Project definition is the activity concerned with describing a project. This activity involves specifying a project boundary and identifying those features of an educational problem area of concern which are to be dealt with by the project. The description includes all the statements of objectives which are intrinsic to the activity being developed and explains the broad to specific nature of the project.

Lesson 3 - Developing a Work Flow

The concept of work flow is defined and its relationship to the overall project planning phase established. Basic principles of construction and commonly used symbols are represented. Emphasis is given to the use of event-oriented and activity-oriented network diagrams or charts as a means of showing the sequence and logical order in which project tasks identified in the work breakdown structure or project definition step must be accomplished. The importance of the graphical representation as a logical tool, a communication device, and a means of project control are cited.

Lesson 4 - Time Estimation

Time estimation is an attempt to determine the length of time

Lesson 4 - Time Estimation (cont.)

needed by a skilled person to accomplish the task assuming availability of resources and equipment. Time estimation utilized units of time (e.g., weeks, days, etc.) and includes the most likely and optimistic times needed to complete a project.

Lesson 5 - Resource Estimation and Scheduling

Resource estimation is the process of determining the various types or categories of resources needed to accomplish the various tasks or activities in the project. Resources are generally of four types--personnel, equipment and materials, services, and travel. Effective project management requires that the resources be allocated in such a manner to provide for a smooth flow of work. The process of project scheduling is highly related to the careful determination of resource needs and their proper allocation among the tasks during the course of the project.

Lesson 6 - Cost Estimates and Budgets

Cost estimation is the determination of the amount of money needed for a work unit and for the total project. The budget is the plan for expending project resources.

Project Preparation Phase

Lesson 7 - Project Start-Up

Project start-up focuses upon the activities involved in preparing to put a project into operation. A project start-up plan should be developed. It should cover proposal review, project personnel appointment and/or recruitment, equipment and material acquisition, space and facilities acquisition, and project handbook development. Careful planning and preparation at this stage can prevent many problems and delays in project operations.

Lesson 8 - Project Information System

Developing a project information system is an early activity in managing a project. This information system includes a project data base, organizational charts and documents, and a procedures handbook. Work sheets of schedule, cost, and performance are inputs to the data base as well as information from the proposal plan document and negotiated contracts. Task assignments, responsibility appointments, and updated progress of work are inputs to the information system; reports to other organizations are outputs of the information system.

Project Operational Control Phase

Lesson 9 - Project Operations--Monitoring and Control

Problem identification through reporting is the first step in

Lesson 9 - Project Operations--Monitoring and Control (cont.)

the three-step, problem-solving process called control. Problem identification is dependent upon a reporting system which provides information on the past, present, and projected status of the project work effort. Deviations between the planned situation and the actual situation represent management problems. Deviations are discovered by making time, cost, and performance measurements at specified points in the life of a project.

Lesson 10 - Problem-Solving Through Management Action

The solution of a problem which occurs during the operation of a project involves the determination of the cause of the problem, the generation of alternative solutions, and the selection of a "best" solution. The selection of a "best" solution is facilitated by the analysis of each alternative on the basis of project "needs" and "likes." The analysis of an alternative involves evaluation for each "need" and the prioritization of each "like."

Lesson 11 - Implementing Changes in Project Operations

After selecting action to be taken to solve a problem, it is necessary to implement it. Such action must plan for consequence, and include controls, reporting procedures, and detailed staff instructions. Information must be provided to management about the changes made. The decision must be monitored to be sure it is working smoothly.

Project Termination Phase

Lesson 12 - Project Termination

When nearing the end of a project, the project manager initiates the activities of closing out the project. A plan for termination activities is required and includes final reporting (local and state), disposition of facilities, equipment, and supplies, task assignments for personnel, sorting and disposition of project records, and final financial accounting.

MODULE MATERIALS

The materials that are needed for successful completion of this module are the following items:

- module manual
- project proposal (application)
- past evaluation reports from the project site
- previous project components such as schedules, handbooks, job descriptions, etc.
- reporting forms to be used by the project (evaluation, attendance, academic record examples, other LEA documents as needed)

Lesson 1--Introduction to Summer Principal Orientation

Lesson Abstract and Content Outline

ABSTRACT

An orientation to the module is provided by identifying the lessons connected with each phase of the life-span of the project. The components constituting the lessons are described and the term "project" is defined and described in some detail. Project management is explained and the functions of management are described. The role and some of the duties of a project manager are identified.

CONTENT OUTLINE

A. Organization of materials presented in the module are described.

1. Written information
2. Visual information
3. Coordination between written and visual information is provided
4. Practice of knowledge is presented through lesson exercises

B. Introduction to concepts of project management.

1. Analysis of the instructional package, each of which is the subject of a lesson grouped within four large-scale phases:
 - a. planning
 - b. preparation
 - c. operational control
 - d. termination or transition

2. A definition of the term project is stated.

A project is a unique goal-oriented activity, characterized by uncertainty about the path leading to the goal and delivering some definable end product within time, cost, and performance specifications.

3. Definition of the term project management and components thereof.

- a. management of a summer term project

Lesson 1 (cont.)

CONTENT OUTLINE (cont.)

4. The functions of management are described.

The functions are:

- a. planning
- b. organizing
- c. directing
- d. controlling

5. The role and duties of a project manager are described.

- a. Roles such as planner, integrator, evaluator, implementor and decision-maker are identified.
- b. His primary responsibility is to accomplish project goals within time, cost and performance specifications.
- c. Duties such as goal setting, planning, time estimation, scheduling, resource allocation, budgeting, direction and control are pointed out.

LESSON TEXT

INTRODUCTION

The purpose of this module is to introduce you to the various phases of the summer project and to the basic principles and techniques of project management. It will help you to acquire the knowledge and skills required to manage a summer term project effectively.

The first lesson deals with the concepts involved: project, management, project management, and the role of the project manager.

Characteristics of a Project

What is a migrant summer term project? The concept of a project can be understood by examining some of its main characteristics. A project is an activity which is goal-oriented, has some uncertainty about the manner in which it will be accomplished, has a finite life span and a cost limit.

Goal-oriented means that the activity is aimed toward some identifiable end-product or capability. It is characteristic of project activity that its end-product or capability be defined or specified in such detail (performance capabilities), that the outcome of the

Lesson 1 (cont.)

Characteristics of a Project (cont.)

activity and a means for evaluating the outcome is readily available to the individuals involved in the project and to individuals monitoring, auditing and evaluating the project.

Uncertainty is a main characteristic of projects because they are usually a unique or once-through kind of effort, and often there is uncertainty about how the goal will be accomplished. The amount of uncertainty varies from project to project, depending upon factors such as the uniqueness of the effort and the inherent complexity of the overall project task. Staff inexperience may also result in uncertainty.

Having a finite life span means that an activity possesses a beginning and an end. Thus, a project has specified start and completion dates and consequently can be thought of as a temporary effort. On-going activities which do not have specified start and completion dates are referred to as functional activities or permanent systems.

Finally, the project goal must be achieved within a specified cost limit. Project efforts involve the use of resources, such as time, people, facilities, materials, equipment and services. These resources are usually translated into dollar amounts in a budget document which specifies the project cost limit that is not to be exceeded.

Thus, projects have the following characteristics: a specified goal to develop an end-product or capability, some uncertainty about how the goal is to be achieved, start and completion dates, and a cost limit.

Management Functions

In order to have a workable understanding of project management it is essential to develop an understanding of the concept of management. In discussing management and its functions, we assume that a formal organization of superior-subordinate relationships exists. In this framework, the function of management is to create an environment which will allow the employees to function effectively by creating appropriate work conditions for them.

Lesson 1 (cont.)

Management Functions (cont.)

Management involves making decisions about the allocation of resources and the direction of people, so that the desired end will be attained most efficiently. You manage when you plan, organize, direct, and control the use of resources. These four basic activities are the functions of management.

Project management incorporates the basic management functions and is the process of making decisions about the accomplishment of a project goal through the execution of a temporary effort characterized by time, cost and performance specifications.

Managers are engaged in getting things done with people. Managers perform the same functions regardless of their level in the organization or the type of enterprise they are pursuing. Only the techniques of applying the functions are modified from situation to situation.

The most typical or accepted method of classifying management functions is to group them to the activities of planning, organizing, directing (or motivating), and controlling. It is often impossible to place each management function neatly into one of these categories, since they tend to overlap; however, this classification is helpful and workable.

Planning involves making a set of initial decisions about the optimum allocation of resources to set of tasks aimed at attaining specific desired goals. It consists of the activities of setting goals, delienating work, scheduling the work-flow, determining the time and resources (money and manpower) required to achieve the goal, costing the resources and preparing a budget.

Organizing involves the arranging of selected people in patterns of relationships relative to authority, responsibility, roles and accountability in order to facilitate the accomplishment of desired goals. It includes, therefore, recruiting, selecting, training and assigning persons to accomplish the activities. This sub-function of organizing is called staffing. Organizing is also manifested in the preparation of policies, procedures, and practices related to project operations.

Lesson 1 (cont.)

Management Functions (cont.)

Directing involves the employment of diverse forms of human interaction aimed at leading, motivating and guiding people in the performance of their tasks. It also involves guiding and supervising subordinates who require clarification of assignments, guidance toward improved performance, and motivation in order to confidently achieve the stated goal.

Controlling involves the detection of deviations between what is planned and what is actually happening, the analysis of deviation, a proposed solution and the implementation of corrective action to insure the successful accomplishment of the goals. The controlling function is operationalized through an iterative problem-solving process.

Management, then, is the process of applying these four basic functions to the operation of an on-going program. That is, management is concerned with making decisions about how to accomplish the ends of an on-going program, through the execution of the general management functions of planning, organizing, directing, and controlling.

Definition of Project Management

Project management incorporates the basic functions of the management process. It is the application of the basic management functions of planning, organizing, directing and controlling to the operation of a project. Recalling that a project has a finite life and, hence, is of a temporary nature, project management can be thought of as the management of a temporary effort.

Project Management Phases

The life span of a single project can be divided into four periods, termed the planning, preparation, operational control and termination phases. The project planning phase includes setting goals for the project; specifying the work to be done by providing a descriptive flow of the tasks; determining time schedules, material and manpower needs; and preparing a budget. The preparation phase involves obtaining and organizing personnel, equipment, materials, facilities and information so that the project can be initiated and

Lesson 1 (cont.)

Project Management Phases (cont.)

operated as planned. The operations phase consists of those activities and efforts concerned with the actual conduct or operation of the project. It is also aimed at detecting deviations, analyzing the problem causing the deviations, considering alternative solutions, making decisions, and implementing those decisions in order to insure the success of the project. Finally, the termination phase includes those activities or efforts dealing with the ending of the project. Such activities include reporting about the project and the transfer of records and equipment. This phase may focus upon stopping a project in progress, ending a project when its goals have been achieved, or on integrating the project activities into an on-going instructional program upon completion of the project.

Role of the Project Manager

Studies of project management indicate that one of the most important factors in the successful completion of a project is the knowledge and skill possessed by the project manager. The role of a project manager makes him the planner, integrator, organizer, director, implementor, operator and controller of the entire project effort. Some of the project manager's specific duties include establishing project goals, specifying tasks and work flow, scheduling time, allocating resources, preparing/assisting with the budget, delineating responsibilities for the staff, and reviewing, evaluating and controlling project activities. The primary responsibility of the project manager, however, is the accomplishment of the project goals within time, cost and performance specifications.

Lesson 1 - Activity - Function(s) of Project Director
and Principal

Time Needed: 15 - 20 minutes

Materials Needed: -Project Proposal
-Training Module Overview
-Project Handbook (optional)

Task: Your task is to arrive at a rough determination of if/how the four functions of management will be shared between the project director and principal(s). Use the first column of the activity sheet provided to you with this lesson. The resource-consultants are available to assist you with this activity.

Closure For Lesson 1

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

Lesson 1 - Activity - Function(s) of Project Director
and Principal

Who will perform the function?	End of Lesson 12	
	Director	Principal
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Lesson 2 -- Project Definition

OVERVIEW

In the previous lesson the general concept of project management was introduced, several terms were defined, and the overall sequence of the project management topics was explained. This lesson is concerned with defining the tasks of a project. Subsequent lessons explain how to place these tasks in proper sequence, estimate the time and resources need for their completion, and determine the budget items that will be required.

OBJECTIVES

The participant should be able to

- state (and understand) the broad overall goals and objectives of the summer project being planned
- create a breakdown of the given goals and objectives to identify program components
- create a breakdown of the organizational system for the summer project.

ABSTRACT

Project definition is the activity concerned with describing a project. This activity involves specifying project boundaries and identifying those features of organization which are to be dealt with by the project. The description should include all stated goals and objectives related to the project components, as well as the organizational system the project intends to follow.

CONTENT OUTLINE

- A. Project definition is the effort involved with describing a project. This description includes:
 1. Understanding the components of the program proposal/application for the project (e.g., budget, staffing patterns, program narrative, etc.)
 2. Understanding the general nature of the program goals and objectives (program narrative)

- B. The second activity in defining a project is the ordering of project objectives into the various component areas the project intends to have.
 - 1. Defining the component areas
 - 2. Charting each component area in order to have an illustrative overview of the intention of the project.
- C. The third activity is to develop an organizational chart for the project.
 - 1. Project area involvement
 - 2. Staffing patterns and lines of authority/communication.

Lesson 2 - Text

This lesson is the first of five lessons dealing with the project planning phase of the project management process. The project planning phase includes the following activities: [1] defining the project in terms of its goals and objectives and specifying the organizational elements of the particular project, [2] describing the flow of the work or tasks, [3] estimating time, [4] allocating resources, and [5] preparation/utilization of the budget. This lesson will concentrate on number [1], defining the project in terms of its goals and objectives and specifying the organizational elements of the particular project.

Project definition is a process of expressing in written form the project goals and objectives. Understanding all components of your project is considered essential in order for you to have ultimate success with your program. Therefore, you need a thorough review and understanding of the project proposal/application.

Activity 1 - Summer Proposal/Application

Time Needed: exact amount based upon team needs.

Materials Needed: Individual program proposals/applications

Task: Read and review your summer proposal as a team. Pay particular attention to the budget, staff page, and overall goals and objectives.

Activity 2 - Chart

Time Needed: 10 - 15 minutes

Materials Needed: Legal size paper, pen, ruler and Project Proposal

Task: Using your project proposal, identify all program components your program intends to focus upon for the summer. You may wish to follow a diagram approach. A model is provided for you to begin this activity.

Activity 3 - Organizational Elements

Time Needed: 10 - 15 minutes

Materials Needed: Legal size paper, pen, ruler and Project Proposal

Task: Using the Staff page from your project proposal, draw a diagram that will include the following:

1. Participating district(s)
2. Administrative Personnel
3. Instructional Staff
4. Support Services Staff

Your diagram should indicate lines of authority as well as lines of communication. A model is provided for you to begin this activity.

Closure For Lesson 2

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

Lesson 2 - Activity #2 - Model



14

READING

MATHEMATICS

RECREATION ACTIVIT.

SPECIAL EDUCATION

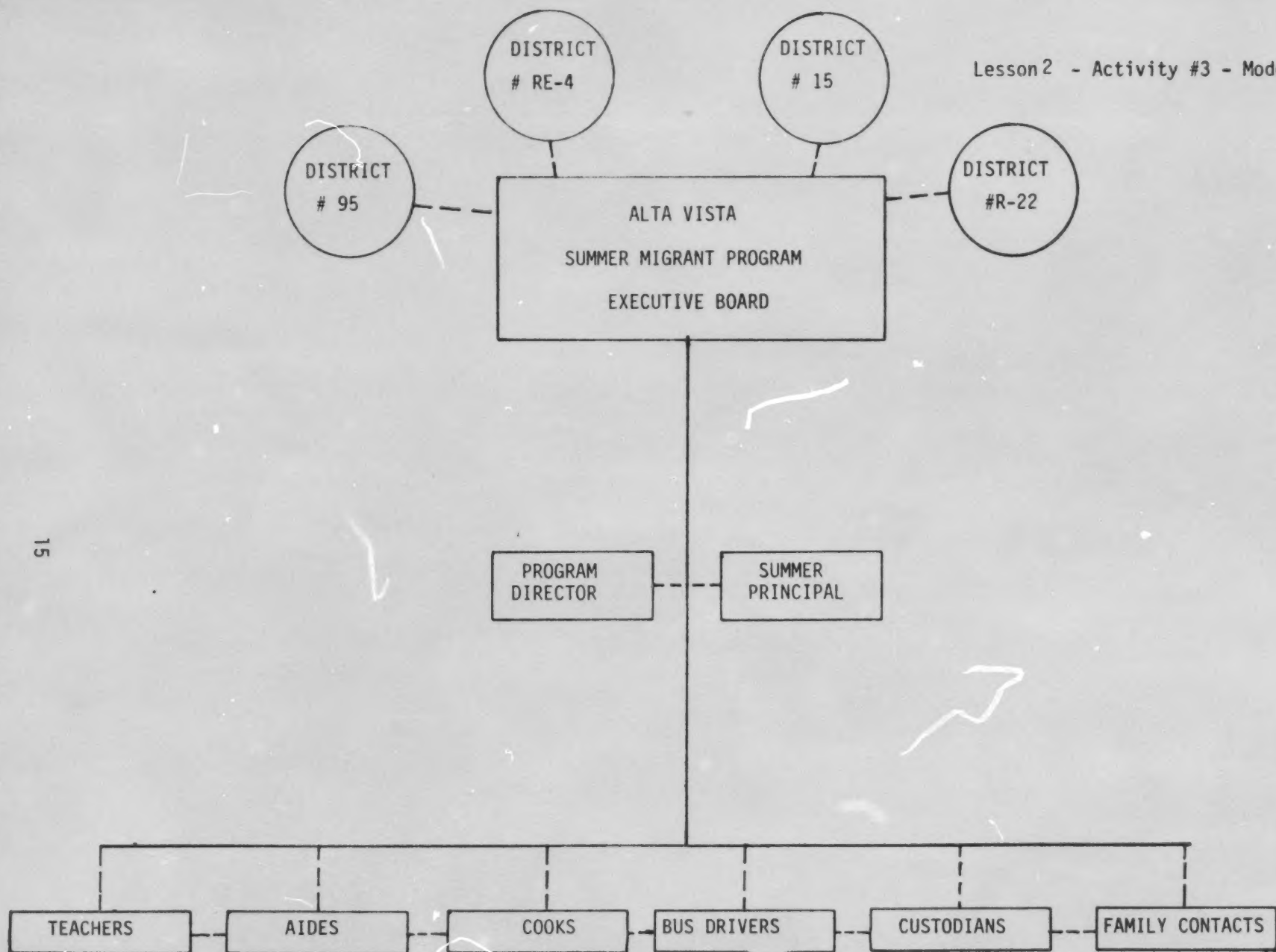
TRANSPORTATION

MEDICAL/DENTAL SER.

FAMILY NIGHTS

24

25



Lesson 3 -- Developing a Work Flow

OVERVIEW

This lesson is concerned with the process of developing a graphical representation which shows the logical sequence or order as to when each task in the project will be accomplished in order to achieve the overall goals and objectives for the project.

OBJECTIVES

1. The participant will be able to use a work flow chart for his/her summer term project
2. The participant should be able to check and correct a given work flow chart for completeness and logical order by tracing an example of tasks through the work flow.

ABSTRACT

The concept of work flow is defined and its relationship to the overall project planning phase is established. Emphasis is placed on those tasks that are event-oriented and activity-oriented so that proper identification and accomplishment of the tasks occurs.

CONTENT OUTLINE

- A. Work flow is the logical arrangement of the various tasks of the project.
 1. The development of the work flow is important because it:
 - a. shows the logic of the planner
 - b. forces the formulation of a plan
 - c. serves as a communication link among staff
 - d. serves as a device for noting project process
 2. Establishing a work flow allows for the sequential logic of project tasks. Tasks may be viewed in a number of ways:
 - a. as event-oriented, where the start and completion of each task is emphasized
 - b. as activity-oriented, where the emphasis is placed upon the work taking place during the tasks, and their sequential flow
- B. Milestone events, such as reports, are especially important start or completion points for tasks in the project. These milestones should be identified in the work flow.

Lesson 3 - Text

Once the project has been identified and the set of tasks are determined and arranged into a work breakdown structure, the project planner is ready to develop the work flow.

The work flow is a visual display of a proposed order of task accomplishment from the start of the project to its completion. Creating this "logical flow" of the project activities serves as a communication medium among project personnel, provides a basis for marking the progress of the project, and aids in highlighting major areas of priority.

Work flow is often viewed as event-oriented, where the major focus is upon the start and finish of the project tasks, or as activity-oriented, where the major focus is upon the tasks, activities or work that must be accomplished.

Event-Oriented Tasks

An event specifies the start or stop of a task. It is a point in time, and does not consume resources. The description of an event must meet the following criteria: specify a clearly definable point of occurrence in time, convey uniformity of understanding, and be capable of verification. Concentrating on event-oriented tasks allows for interrelating of activities to ensure proper coordination and completion of the tasks.

Milestone Events

A milestone event is an event whose completion signals a major accomplishment for the project. Milestones often represent a gathering point for several activities, a point of divergence for several activities, an interim project report, or a point within the project about which there exists considerable risk or uncertainty.

Activity-Oriented Tasks

An activity represents a project task that consumes time and resources. The description of an activity must meet the following criteria: the description must specify either physical or mental work, be of sufficient detail so that the planner is able to associate required time and resources with the activity, enable the planner to determine responsibility for the activity, convey a uniformity of understanding, and permit the activity to be observed and measured.

Constructing the Work Flow

The logic used in developing the sequence of tasks implies a cause and effect relationship where each task is related to the other tasks over time. The process of ordering tasks is best accomplished by asking oneself questions about the logical connections between all pairs of events, tasks, or activities. In the work flow, the tasks identified in the work breakdown structure are placed in a sequential order that is based upon logical or desired relationships.

Faulty work flow efforts can result in misdirected project effort and wasted resources. Inadequate work flow charts are those which do not show clearly the route to the accomplishment of the stated end product, lack a single termination or end event, lack decision points, or support a work effort in a never-ending cycle.

Activity 1 - Developing Work-Flow Charts

Time Needed: 30 min. - 1 hour

Materials Needed: One sheet of paper for every component you listed under Activity 2 from Lesson 2--Project Definition. Your project proposal is optional.

Task: Arrange each component area so that you can identify all possible tasks that may be involved in order to complete that event/activity. Consider the sequence within the tasks as input→process→output. See next page for an example on this activity.

Closure For Lesson 3

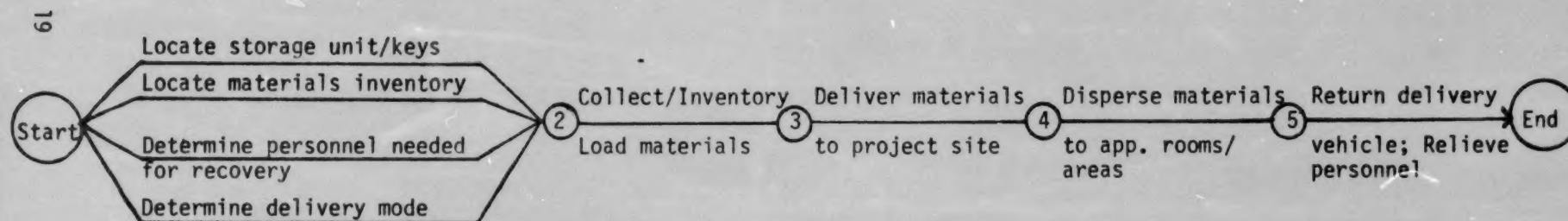
If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

Lesson 3 - Activity 1 - Task Model

An Example:

Task: To locate all materials that are in storage from the previous summer project



Lesson 4 -- Time Estimation

OVERVIEW

This lesson concerns itself with the methods of determining the time required for various tasks and the total project itself based on the tasks that must be accomplished.

OBJECTIVES

The participant should be able to

- determine the time that will most likely be needed for completing a given task
- calculate the critical path for a project given a work flow and time estimates for the various tasks

ABSTRACT

Time estimation is an attempt to determine the length of time needed by a skilled person to accomplish the task assuming availability of equipment and resources. The time estimation is the amount of time it takes to complete the tasks, especially the longest time path of the work flow, called the critical path. Time estimation uses units of time (e.g., months, weeks, days, etc.) and includes the most likely, pessimistic, and optimistic times needed to complete the project.

CONTENT OUTLINE

- A. Time estimations are made for each of the tasks of a project and for the total project time.
 1. Work component chart from the project definition is used
 2. Work flow task diagram is used for total project time estimation
 3. An overall work grid is developed for the project
- B. There are two types of time estimations.
 1. Deterministic time estimates are used when fairly precise estimates are made based on information available from the same tasks done previously
 2. Probabilistic time estimates are used when little information is available.

- C. Time estimations vary, depending upon:
1. The nature of the task itself
 2. The degree of performance required in the task
 3. The rate of resource expenditure allowed for the task

Lesson 4 - Text

After developing a work flow, the next step in project planning is the development of time estimates for individual project tasks and for the total project. In order to make these time estimates, the type and extent of work required for the accomplishment of each task must be determined.

Time Estimating Process

The process of time estimation involves both the estimate of the time required to complete individual tasks and the time required to complete the entire project effort. One can do this by using deterministic or probabilistic time procedures (see definitions in outline). In the latter case, the estimator should consider an optimistic, a most likely, and a pessimistic time. If he can find a somewhat similar task in a previous project where things went well, he can use the reported time as the optimistic time. Likewise, he can obtain a pessimistic time estimate by finding a similar task where everything went wrong. The most likely time is the time the task would take under normal conditions.

It is highly recommended that the people who will eventually perform the tasks, or are knowledgeable about the tasks, be involved in deriving task times. As a result of their involvement, there will more than likely be a more comfortable attachment to the task in the event they are eventually assigned to it. The use of potential project people should be clearly defined as assistance for the purpose of time estimation and not be defined as task assignment.

When all tasks of a project have an estimated time for completion, a total or overall time grid is computed. Few, if any projects, are done as a sequence of tasks one at a time. Thus, it is the understanding that the sum of the tasks along all possible paths (critical time path) is the best possible route for successful completion of the project.

Lesson 4 -- Time Estimation

Activity 1 - Areas of Concern (Time Estimation)

Time Needed: 10 - 15 minutes/task (app.)

Materials Needed: List(s) of Tasks Identified in
Activity 1 from Lesson 3 --
Developing a Work Flow,
Area of Concern Form (NCR copies)

Task: From the list(s) of tasks that you identified in Activity 1 of Lesson 3, create an Area of Concern sheet for every task. Fill in all appropriate spaces on the form (except for the time-line). Once you have satisfactorily completed the sheet, project a possible target date for completion of the task and place that projection on the time-line at the top of the form.

(Please see the example that has been provided for you).

Reminder: There are resource-consultants available to assist you in completing the forms. Feel free to call upon them as you complete your Area of Concern forms.

Closure for Lesson 4

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
-------	-----	------	------	--------	-----------

AREA OF CONCERN: _____ DATE COMP: _____

	Lo	2	3	4	Hi	
PRIORITY:	1				5	
PERSON(S) RESPONSIBLE (CHECK):	<u>*A</u>		<u>*C</u>			PROJECT NUMBER: _____
Director/Coordinator	_____	_____				_____
Principal	_____	_____				_____
Teacher	_____	_____				_____
Paraprofessional	_____	_____				SUPPLIES/MATERIALS:
Family Contact	_____	_____				_____
Records Clerk	_____	_____				_____
Other (Specify):	_____	_____				_____
_____	_____	_____				COST (if app.):
_____	_____	_____				\$ _____
_____	_____	_____				

*[A-Active *C-Coordination]

RESOURCES AVAILABLE

	Name	#
District:	_____	_____
BOCES:	_____	_____
Service Agencies:	_____	_____
	_____	_____
	_____	_____
CDE:	_____	_____

Additional Information:

Lesson 5 -- Resource Estimation and Scheduling

OVERVIEW

The successful completion of any project depends on the amount and type of resources made available to the effort and/or requested to support the various project tasks.

OBJECTIVE

The participant should be able to

- estimate the resources necessary for accomplishment of each given task
- construct and complete a task-event grid
- calculate or establish the time required for the acquisition and completion of resource tasks

ABSTRACT

Resource estimation is the process of determining the various types of categories or resources needed to accomplish the various tasks or activities in the project. Resources are generally of four types--personnel, equipment and materials, services, and travel.

CONTENT OUTLINE

- A. Resource requirements for a project are determined by establishing the personnel, equipment, materials and services, and travel needed for each of the project tasks.
- B. Considerations in the estimation and allocation of project resources are:
 1. Manpower or personnel
 - a. expense
 - b. training
 - c. excess/shortage
 2. Level of performance
 3. Possibility of shared use of resources
- C. Scheduling is the process of allocating resources to the various tasks over time.
 1. Identifying the start and completion time for each task
 2. Considering the constraints (availability of people, facilities, guidelines, etc.)

3. Providing for criteria
(minimum/maximum time,
minimum/maximum costs,
minimum/maximum performance)

Lesson 5 - Text

Resource estimation is the determination of the type and quantity of resources needed for the entire project by examining the resource needs of each task. Resources in this context are considered to mean manpower, equipment, materials, specialized services or any other commodity which is expressable in physical form.

The utilization of resources has considerable influence upon project performance standards, the reformulation of plans, the estimation of activity times, the establishment of schedules, and the monitoring of project progress.

Resource Planning

The primary questions that must be answered in project resource planning are: What? How Much? When? How? and What are the alternatives?

The first step in resource estimation is to examine the resources required for the completion of the individual tasks described in the project definition. Once the required resources for each task have been estimated, the resources must be scheduled.

Scheduling

Scheduling is the translation of the proposed plan into a timetable showing the specific calendar dates for the start and completion of work. The project schedule places an emphasis upon the scheduled start and end of each activity and of the total project.

A chart that distributes the tasks and resources over a period of time is referred to as a task-resource schedule. In using such a schedule, it is advisable to share common resources among several tasks whenever possible.

Lesson 5 -- Resource Estimation and Scheduling

Activity 1 - Task-Resource Schedule (Time Estimation)

Time Needed: 1 hour (app.)

Materials Needed: Completed copies of the
Area of Concern forms,
Task-Resource Schedule Forms

Task: The Task-Resource Schedule Form is a compilation grid that will allow you to get a total picture of the tasks ahead of you for your summer project. Number each task you identified. Place that number under the column identified or Tasks. Mark an X under the Staff column that you previously identified as having an active role in completing the task. Draw a line through the month(s) you feel will be necessary to complete the task. Refer to the example below if you have any questions.

Example

TASK RESOURCE SCHEDULE

TASKS	STAFF						PRTY	TIME			
	Director/Coordinator	Principal	Teacher	Paraprofessional	Family Contact	Records Clerk					
								APRIL	MAY	JUNE	JULY
1			X		X		1				

Closure for Lesson 5

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

TASK RESOURCE SCHEDULE

[illegible]

Lesson 6 -- Cost Estimates and Budgets

OVERVIEW

This lesson is concerned with translating the information contained in the previous lessons into a budget that reflects all component and task areas of the project.

OBJECTIVES

The participant should be able to

- determine estimated personnel salary, wages, and fringe benefits
- determine estimated costs of project equipment, materials and supplies, contracted services, and travel
- estimate the cost of individual project tasks (where applicable)
- coordinate budgetary efforts for a cost-effective project

ABSTRACT

Cost estimation is the determination of the amount of money needed for a work unit and for the total project. The budget is the plan for expending project resources. The task-resource schedule (see lesson 5) is the basic document used in estimating costs and budgeting.

CONTENT OUTLINE

- A. Cost estimating and budgeting is where the objectives of the budget are transformed into the costs required to achieve them.
- B. The budget helps the manager control expenditures during the operation of the project.
- C. General budget terms include the following:
 1. Direct costs are costs of resource items purchased for the projects
 2. Indirect costs are those shared with a larger organization where the resources only support the project
 3. Costing unit is a function or task around which costs are accumulated
 4. Expenditure plan is a set of decisions about what, when, and how resource items are to be purchased.

- D. The style of the budget depends on:
 - 1. Categories of costs needed for a project
 - 2. Typical style used by the existing organization
 - 3. Local, state, and federal requirements.
- E. The following constraints affect the budgeting process:
 - 1. Minimum wages, maximum fees, payday restrictions, and certification requirements
 - 2. Lack of ability to shift funds from one budget category to another during operations
 - 3. Specific requirements of local, state, and federal agencies.
- F. The following are typical budget categories:
 - 1. Personnel salary, wages, and benefits
 - 2. Equipment
 - 3. Materials and supplies
 - 4. Travel
 - 5. Contracted services
 - 6. Indirect costs.
- G. Local access to resource items should be given priority over outside sources.
- H. Decisions concerning rental as compared to purchase.
- I. Authority for the budget and control.

Lesson 6 - Text

In placing cost estimation and budget preparation as the last step in the planning phase, it is recognized that in some (if not all) cases the available dollar amount is known at the start of the project. Resources support the work in that they expand to meet such available funding levels. Even when the final dollar amount is known, the planning process outlined in these lessons should be followed.

In addition to providing a written record of planned expenditures, the budget helps the manager control project costs. He does this by looking for deviations from the spending plan as the operational phase of the project is being carried out.

Basic Concepts and Terminology

A budget is a plan for the spending or allocation of money to accomplish some objective or goal. The process of determining how much money is needed to accomplish project objectives is called cost estimation. Direct costs include expenditures for personnel, equipment, facilities and services obtained especially for the project. Indirect costs are usually support costs of the larger organization which are pro-rated to a project, but which are not purchased especially for it. A costing unit is a unit of work. Usually it is a specific function or task under which various costs are accumulated. An expenditure plan usually shows the rate of expenditure over time. Constraints refer to limits or boundaries specified by a funding source relating to personnel salaries and benefits, purchases, or the ability to shift funds from one budget category to another.

Understanding the rules and regulations of your project (and their frequent review) will insure that the budget meets the needs of the project and is within externally-imposed constraints.

Developing the Budget

The process of project cost estimation and budgeting is fundamentally one of translating resources needed to accomplish all of the desired objectives into a common denominator--that of dollars.

Budgets are usually prepared in a form consistent with either the local organizational format or that required by a funding agency. A typical budget lists dollar amounts for personnel (usually the first and most costly direct expenditure), equipment, materials and supplies, travel, and other costs and expenses such as preparation of reports, computer services, and consultant services. In determining the cost of these budget items, the previously developed task-resource schedule (from lesson 5) can be utilized as a reference.

In computing the project cost of skilled personnel both a base salary and employee benefits are included. Employee benefits usually include payments or contributions to such items as a retirement fund, social security, life insurance, and health or medical insurance.

The cost entries for equipment, materials, and supplies are determined by first referring to the task-resource schedule to identify the needed items and then consulting catalogues and suppliers for cost estimates. Consideration should be given to the alternatives of purchasing, rental, or leasing.

Estimation of costs for contracted services as usually based upon information from actual bids, reference catalogues, or previous project histories.

Budgeting for travel should reflect costs for staff, consultants, and necessary transportation methods. A per-diem allowance (food, lodging, etc.) may also be considered in this area.

Project indirect costs are usually specified last in the budget since they are often related to part or all of direct costs. The method for calculating project indirect costs or expenses varies from place to place.

Activity 1 - Transference of Tasks to Appropriate Funding Sources

Time Needed: 30 minutes (app.)

Materials Needed: - Budget sheet from project proposal
- Task-resource schedule form(s)
- Area of Concern forms

Task: Using your budget sheet and the other forms mentioned under Materials Needed (above), determine the appropriate funding source for every task that you have identified. Using the Function and Object numbers, place those numbers on your Area of Concern form for that task (under Cost) or in parentheses next to your task number on the Resource-Schedule form.

Example: You have identified Teacher salaries as a task. Using your project proposal budget, you identify the Function to be 1000 (Instruction), the object to be 100 or 1000-100. Place that number (1000-100) under COST on the Area of Concern form or on the Resource-Schedule form after the task number.

If you can project a cost for your task, also include that figure on the Area of Concern form.

Closure For Lesson 6

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

Lesson 7 -- Project Start-Up

OVERVIEW

The previous lesson was the last lesson on the first phase of project management--the planning and proposal phase. This lesson is the first of two lessons of the project preparation phase.

OBJECTIVES

The participant should be able to:

- specify proposal revisions when needed
- identify the job qualifications and principal duties of selected project personnel.
- describe the project orientation and communication plan
- identify equipment, material, facility, and space needs of the project
- locate information to be included in the project policy and procedures handbook.

ABSTRACT

Project start-up focuses upon the activities involved in preparing to put a project in operation. A project start-up plan should be developed. It should cover proposal review, project manager appointment, personnel recruitment, equipment and material acquisition, space and facilities acquisition, and project handbook development. Careful planning and preparation at this stage can prevent many problems and delays in project operations.

CONTENT OUTLINE

- A. Project preparation focuses upon activities necessary to get the project underway once it is funded.
- B. The two basic tasks involved in project preparation are:
 1. Preparing to put the project into operation (this lesson)
 2. Developing the project information system (lesson 8)

- C. A plan for project start-up should be developed.
 - 1. The plan should cover proposal review, project manager appointment, personnel recruitment, equipment and materials acquisition, space and facilities acquisition, and project handbook development.
 - 2. The ability to implement the plan is affected by the lead time available between the project approval date and project start date.
- D. Proposal review often results in changes in areas of performance, objectives, schedule, budget, manpower requirements, and performance specifications.
- E. Appointment of the project director must be done early.
- F. Personnel recruitment should be planned.
 - 1. Requirements should be listed
 - 2. Recruitment should occur from inside and outside the project area
 - 3. Orientation for project staff should be planned
 - 4. Preparation for staff training needs to occur
- G. Equipment and materials acquisition should be planned
 - 1. Non-consumable
 - 2. Consumable
- H. Space and facilities acquisition should be planned.
 - 1. Adequate and pleasant work space
 - 2. Desks, typewriters, storage cabinets, and related items to be secured should be identified
- I. A project handbook should be developed.
 - 1. Should contain procedures and policies for project staff guidance
 - 2. Should be distributed to each staff member

Lesson 7 -- Text

The project preparation phase can be divided into two major tasks--gearing-up for project operations and establishing a project information system. This lesson is concerned with your gearing-up plans.

Project Preparation Activities

In order to insure a smooth start-up, a project preparation plan should be developed. The lead time for developing and carrying out of the plan will depend on the personnel on-hand and their expertise.

Some of the major activities that must be included in the plan are: appoint a project manager, review the proposal, employ personnel, acquire equipment and materials, and obtain space and facilities.

Project Manager Appointment

If not done as part of the planning phase, the identification and selection of the project director or manager is the first task to be accomplished in this phase. Each project must determine who the project manager will be. Although this may vary from project to project, the project manager could be the project director or coordinator, principal, or a "head teacher." Designating one person as your project manager will remove any major authority obstacles once the project is underway.

Proposal Review

While your proposal may have been written and/or approved in the planning phase, it may now need to be "adjusted" to fit a variety of situations and circumstances that were not initially thought of at the time the proposal was written. Thus, a review should occur so that any re-negotiation can take place. This could involve re-submission if the changes are of major consequence.

Changes in the plan may occur in several places. Among the most common are: objectives, schedule, budget, manpower requirements, and performance specifications.

Personnel Employment

A careful listing of required personnel should be prepared. The following information should be included as a minimum: duties and responsibilities, skill level, education and experience, date needed, duration of employment, proposed salary, and benefits. Certain personnel may have already been assigned to the project. Recruitment of other staff members will need to be done both in-district or outside of the project area. Early identification of all staff is vital to the success of the project.

In addition, plans must be developed for the timely orientation and training of staff personnel. Orientation activities can be designed to provide visibility to the project and to secure cooperation from participating districts. Training plans for staff need to be identified early as well as ensuring that such activities will be on-going during the life of the project. A "hit-and-miss" approach to staff development will cause more problems down the road and could actually lead to the demise of your project.

Equipment and Materials Acquisition

Timely planning for the acquisition of equipment and materials is vital to project success. Equipment and materials should be listed in terms of their characteristics, date needed, and place of assignment. Guidelines for conducting your equipment and materials needs sensing should be established early and thought out well ahead of your projected starting date.

Space and Facilities Location

Obtaining space and facilities for the project involves securing work and storage space, as well as desks, typewriters, file cabinets, and items of similar nature. Sufficient space should be acquired so that project personnel can work closely together and yet have an adequate work climate and an atmosphere conducive to effective and efficient project operations.

Secure all necessary permission for use of space and facilities early. Written agreement for the use of various items/space should be part of your plans.

Project Handbook

Staff operations and communications can be better facilitated if a project handbook is developed as part of the preparation activities. Development of the handbook should involve the project staff in order to secure their support, keep them informed, enable them to better see their role in the project and assume responsibility for that role. If the project handbook is kept in loose leaf form, it can be modified with ease as the project develops.

Although no standard format exists, a project handbook should generally cover such items as project environment or setting, general project information, organizational chart, reporting formats and frequency, staff

meeting schedules, purchase order logistics, schedules, contract, communication flow, evaluation procedures, and training and travel information. Copies of the project handbook should be distributed to all members of the project staff.

Activity 1 -- Project Start-Up Checklist

Time Needed: 1 - 2 hours

Materials Needed:

- Project Checklist Form
- Project Proposal
- Staff Assignment Sheet (from proposal)
- Equipment and Materials Needs Sensing Guidelines
- Previous samples of project handbooks/schedules

Task: Review your project proposal so see if there are revisions according to the tasks you identified in the planning phase of this module. Should you identify revisions in objectives, schedule, budget, manpower requirements, etc. implement a re-negotiation process as followed by your local district and/or BOCES along with your CDE representative.

Begin completing the Project Start-Up Checklist. Use your resource-consultants wherever possible. Under each area, determine whether you have completed the item listed. Check the appropriate Yes or No space. Determine whether you have an Area of Concern Form filled out for the item (check Yes No). If no, it is recommended that you fill out an A of C form to expedite the task at hand. Then, check to see if the item is listed on your Task-Resource Schedule (Yes or NO). If No, it is recommended that you place the item on the T-RS form once an Area of Concern form is filled out.

Closure For Lesson 7

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

PROJECT START-UP CHECKLIST

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
<u>Project Manager Appointment</u>						
1. Project Manager Identified?	___	___	___	___	___	___
Who? _____						
2. Other Administrative Personnel?	___	___	___	___	___	___
Name/Title: _____						

<u>Proposal Review</u>						
1. Revisions?	___	___	___	___	___	___
List areas: _____			___	___	___	___
_____			___	___	___	___
_____			___	___	___	___
_____			___	___	___	___
_____			___	___	___	___
2. All parties in agreement?	___	___				
Locally?	___	___				
CDE?	___	___				

* Area of Concern Form

** Task-Resource Schedule

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
Personnel Employment						
1. All personnel identified?	___	___	___	___	___	___
2. All personnel hired?	___	___	___	___	___	___

WE STILL NEED:	
_____	_____
_____	_____
_____	_____
_____	_____

3. Job Descriptions available?	___	___	___	___	___	___
- duties/responsibilities listed?	___	___				
- skills listed?	___	___				
- education and experience listed?	___	___				
- date needed shown?	___	___				
- duration of employment included?	___	___				
- proposed salary/benefits included?	___	___				
4. Staff Orientation Scheduled?	___	___	___	___	___	___

Date: _____	Location: _____
Time: _____	

5. Staff Development Plan in place?	___	___	___	___	___	___
Who?	What?	When?	Where?	Cost?	Resources?	

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
<u>Equipment and Materials Acquisition</u>						
1. Needs-Sensing done?	—	—	—	—	—	—
2. Available items inventoried and ready for use?	—	—	—	—	—	—
3. Ordering done?	—	—	—	—	—	—
4. Delivery system in place?	—	—	—	—	—	—
5. Have participating districts been involved to avoid duplication?	—	—	—	—	—	—
<u>Space and Facilities Acquisition</u>						
1. School site(s) designated?	—	—	—	—	—	—
2. Contract available (where applicable)?	—	—	—	—	—	—
3. Sufficient # rooms (classrooms, materials space, lunchroom, offices, etc.)?	—	—	—	—	—	—
4. Physical Facilities Inventory done?	—	—	—	—	—	—
5. Coordination/involvement of regular building principal necessary?	—	—	—	—	—	—
6. Access to recreation areas/equipment?	—	—	—	—	—	—
7. Storage space available?	—	—	—	—	—	—
8. Custodial services agreement in place?	—	—	—	—	—	—
9. Desks, typewriters, cabinets, etc.?	—	—	—	—	—	—

* Area of Concern Form

** Task-Resource Schedule

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
10. Support Services facilities available (lunchroom, nurses area, gym, library, etc.)?	—	—	—	—	—	—
11. Security arrangements made?	—	—	—	—	—	—
12. Transportation vehicles available?	—	—	—	—	—	—
13. Food ordering/preparation?	—	—	—	—	—	—
14. Grounds maintenance needed?	—	—	—	—	—	—
15. Environmental considerations accounted for (heat, cooling, water, sound dispersing, etc.)?	—	—	—	—	—	—
16. Communication available (phone, intercom, etc.)?	—	—	—	—	—	—
17. Other?	—	—	—	—	—	—
_____	—	—	—	—	—	—
_____	—	—	—	—	—	—
_____	—	—	—	—	—	—
_____	—	—	—	—	—	—

Project Handbook

1. Physical arrangements (copying, distributing, etc.) made?	—	—	—	—	—	—
2. Project setting included (map of facilities)?	—	—	—	—	—	—
3. Organizational chart?	—	—	—	—	—	—
4. Communication flow?	—	—	—	—	—	—
5. Goals/objectives listed?	—	—	—	—	—	—

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
6. General Project Information:						
- student information and records?	—	—	—	—	—	—
- attendance procedures?	—	—	—	—	—	—
- general program evaluation?	—	—	—	—	—	—
- internal classroom records (lesson plans, profiles, etc.)?	—	—	—	—	—	—
- testing procedures?	—	—	—	—	—	—
- daily schedule?	—	—	—	—	—	—
- instructional components information?	—	—	—	—	—	—
- materials purchasing procedures?	—	—	—	—	—	—
- health component information?	—	—	—	—	—	—
- food program/nutrition information?	—	—	—	—	—	—
- field trip procedures?	—	—	—	—	—	—
- home visits?	—	—	—	—	—	—
- recess/playground procedures?	—	—	—	—	—	—
- special needs children procedures?	—	—	—	—	—	—
- Family Nights?	—	—	—	—	—	—
- student discipline procedures?	—	—	—	—	—	—
- availability of resources?	—	—	—	—	—	—
- length of school information?	—	—	—	—	—	—
- transportation information?	—	—	—	—	—	—
- end-of-school procedures?	—	—	—	—	—	—

* Area of Concern Form

** Task-Resource Schedule

AREA	YES	NO	*A of C?		**T-RS?	
			YES	NO	YES	NO
7. Staff Information:						
- Personnel List?	___	___	___	___	___	___
- Job Descriptions?	___	___	___	___	___	___
- Staff Meetings Information?	___	___	___	___	___	___
- Payroll Information?	___	___	___	___	___	___
- Information on illness, day-to-day operations, etc.?	___	___	___	___	___	___
8. Samples of all forms to be used for the project?	___	___	___	___	___	___
9. Other information:						
_____	___	___	___	___	___	___
_____	___	___	___	___	___	___
_____	___	___	___	___	___	___
_____	___	___	___	___	___	___
_____	___	___	___	___	___	___

* Area of Concern Form

** Task-Resource Schedule

Lesson 8 -- Project Information System

OVERVIEW

This lesson deals with establishing the project information system whereby the manager makes provisions for the selection, use, and retrieval of information pertinent to the operation of the project.

OBJECTIVES

The participant should be able to:

- identify the tasks involved in setting up a project information system
- identify the basic elements of data base for the project situation

ABSTRACT

Developing a project information system is an early activity in managing a project. This information system includes project data base information, organizational charts and related documents, and a procedures handbook. Task assignments, responsibility appointments, and updated progress of work are inputs to the information system; reports to the project director and to other organizations are outputs of the information system.

CONTENT OUTLINE

- A. The project information system serves to:
 - 1. Reflect actual progress against project status at any given time
 - 2. Provides a means for general communication as well as specific techniques of reporting
- B. The components of a project information system are:
 - 1. Data base
 - 2. Organizational chart and related documents
 - 3. Project handbook or manual
- C. The data base is developed using a number of reporting instruments:
 - 1. Written records
 - 2. Computer records
 - 3. State approved forms
 - 4. Locally approved forms

- D. A project information system is essential to operational control of a project

Lesson 8 -- Text

This lesson is concerned with the major task of developing a project information system. Successful operation of the project depends to a great degree upon the project manager and his staff knowing what should be happening on the project, what is actually happening, and who should make it happen.

Project Data Base

The basic function of the data base is to accumulate all information concerning program activities into a centralized system for program reporting. The information to be placed in the data base is usually derived from the proposal document. Specific data is usually included regarding project objectives and specifications, activity and event identification, resources used, budget expenditures, etc.

Data base information can vary from project to project. Thus, it is up to the individual project to determine who will be responsible to secure the data, what kind of data the program is required to (or will) maintain, when the data will be retrieved, where the data will be kept or sent, and how the data will be used by the project.

Who

Depending upon the organizational structure of the project, who will be responsible to collect data needs to be determined. The combination of the organizational chart and job descriptions should give the project manager a focus point for determining the staff who will have responsibilities in this area.

What

What data is necessary to be maintained by the project? The proposal document is your central point in assisting you to identify that information the project is obligated to document as well as support data the project may wish to maintain for future planning. This may include student growth measurements, attendance, medical/dental records, meal preparation, resources accessed, etc.

When

Does a reporting cycle need to be established to ensure timely acquisition of data? It is very important that the project staff know when information is to be secured so that everything isn't left to accumulate at the last minute. Establishing a time-line for when data must be available for reporting is a necessary component to your project information system.

Where

Has the project established a designated location for data to be kept? Is there data that must be sent on a regular basis to another location? The project manager must establish a central site from where data can be retrieved or disseminated out to his staff. Thus, it is important that this "network" be developed so that information is not lost. Some data may be housed in a central office; other data may be in individual areas such as classrooms or centers. Whatever is established, a routine must be set up so that all staff are aware and can use the "network."

How

Maintaining a data base is not useful unless your staff knows how to use the information. Using project information is your key component. Receiving information, recording information, sending information, etc. will not be of any use if your staff do not commit themselves to the purpose of having and utilizing the data available to them. Thus, the project manager must integrate the use of data into all component areas of the project. Without this integration effort, your data information will not be of use to anyone.

Activity 1 -- Establishing Your Project Information System

Time Needed: 1 - 2 hours

Materials Needed: - Project Proposal
- Project Handbook
- Project Information
System Worksheet

Task: Using your project proposal, identify all data base information that your project intends to maintain. Once you have identified your data base information, complete the Project Information System Worksheet. Keep in mind that some items may not be applicable to your project. If so, mark those items as N/A.

Resource-consultants are available to assist you with this activity. Also, a sample sheet of possible data items is provided to further assist you with this activity.

Closure for Lesson 8

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

Sample Data Items

MSRTS - Academic/Medical
Skills Information System
Student Profiles
Class Profiles
Criterion-Referenced Tests
Program Management Systems
Teacher Lesson Plans
Attendance Registers
Lunch Count Forms
Field Trip Grids
Materials/Equipment Inventory
Budget Expenditure Forms
CDE/DARU Forms
Locally Developed Evaluation
State Evaluation
Food Services Forms
State Health Forms
Contact/Recruiter Logs
Teacher Home-Visit Logs
Special Education Services Forms
Media/Library Utilization Forms
Parent/Visitor Log

PROJECT INFORMATION SYSTEM WORKSHEET

COMPONENT AREA: _____

DATA	RESPONSIBILITY (STAFF)	NEEDED BY (DATE)	LOCATION	METHOD FOR USE
ITEM:				
ITEM:				
ITEM:				
ITEM:				

PROJECT NUMBER: _____

Lesson 9 -- Project Operations--Monitoring and Control

OVERVIEW

This lesson is concerned with the first step of project operational control--problem identification. Problems in the operation of a project are identified by comparing the actual status of the project with the planned status indicated originally in the project information system. Thus, the lesson will be concerned with the development and selection of alternative solutions to the identified problems.

OBJECTIVES

The participant should be able to:

- identify deviations from the original intent of the project

ABSTRACT

Problem identification is the first step in the three-step, problem-solving process called control. Problem identification is dependent upon a system which provides information on the past, present, and projected status of the project work effort. Deviations between the planned situation and the actual situation represent management problems.

CONTENT OUTLINE

- A. Control is a cyclical, three-step problem-solving process.
- B. A system which provides written and oral information is needed in order to exercise management control.
- C. The essence of problem identification is the comparison of the planned situation with the actual situation.
- D. When a deviation between "shoulds" and "actuals" is found, a project management problem has been found.
- E. Identified deviations should be listed in priority order on the basis of their likelihood to impede the progress of the project (if possible).

Lesson 9 -- Text

After a project has been planned and the start-up plan executed, the actual operation of the project begins. Regardless of the best planning and preparation effort, operations do not always go as planned. Thus, the project manager must have a system or procedure for knowing the status of the project at all times.

What is meant by the concept of operations monitoring and control? This process is basically a problem-solving process which can be conveniently divided into three steps. The first step is the identification of a problem, utilizing the plan as a guide. The second step is the development of alternative solutions to correct the problem. The third step is the implementation of the desired solution and the communication of changes in operations to the project staff. This lesson is concerned with step one, problem-identification.

Reporting System

A reporting system enables the project manager to determine how the project activities are proceeding. Establishing a progress reporting system involves creating procedures designed to furnish project status information.

Progress reports can be written or oral, or both. Project progress reports should indicate the activities completed or that events that have occurred to date. Reports should be presented in written form if there is a large amount of detailed information. Oral reporting should be used when immediate feedback is needed.

Deviation Identification

Regardless of the form of the report, its basic function is to present the project manager with information comparing the actual to-date progress with the planned progress of the project. If a report indicates that there is no discrepancy between the actual status and the planned situation, then project operations are moving smoothly. If, however, a report indicates that there is a divergence, then a deviation is said to exist. From a project management point of view, this deviation or difference between the project plan (the should's) and what is actually happening (the actual's) is called a problem. Deviations or problems can be categorized into either positive or negative--in the former, operations are going better than planned, while in the latter, they are not going as well as desired.

How does one identify such deviations during project operations? Since all project activities cannot be monitored simultaneously and continually, the project manager must monitor or measure progress at various critical points in the process. For a project, such monitoring or control points could involve calendar dates, dollar expenditures, and performance specifications.

Standards and bounds can be set for each monitoring or control point in the project. A standard is usually a specified level of performance (scheduled completion date for a task, an expenditure figure in dollars), while a bound is the acceptable range of deviation (+ or -) from the specified standard. It should be realized, however, that these standards and bounds are subject to change as the project progresses.

The criteria used to establish both standards and bounds depends upon the project proposal, local educational agency constraints, and the requirements of the project manager. The criteria used could depend on the relative importance attached to time, cost, and performance.

The project manager may elect to identify deviations himself by reviewing progress reports, or he may have the staff identify them in the reports. Since the project staff should be quite familiar with their own tasks, they may be better able to judge their own progress, provided they are given standards and limits from the project information system.

Thus, the significance of the deviations can be determined and the deviations (or problems) can be ranked to establish a priority for solving the most serious problem first.

A reminder: it is much better to consider a system for identifying problems within your project than it is to wait for the State Monitoring Team to find them for you!

Activity 1 - Developing a Progress Reporting System

Time Needed: app. 1 hour

Materials Needed: Project Information Worksheets
(from lesson 8)

Task: While it is impossible to predict any or all of the problems that could occur during a project, it is still necessary to establish a system that will provide project progress as well as detect any deviations to what was planned. Therefore, your assignment is to prepare a "calendar" that will allow you to monitor project operations.

Using the calendar provided to you on the next page, plan for your project reporting system. Some items may not be applicable to your project. The resource-consultants are available to assist you for this activity.

Closure for Lesson 9

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

PROGRESS REPORTING SYSTEM CALENDAR

COMPONENT	ACTIVITY	MONITORING DATE	STATUS		DEVIATION IDENTIFIED
			OK	NOT OK	
READING	TESTING				
READING	STUDENT PROGRESS				
READING	MATERIALS				
MATHEMATICS	TESTING				
MATHEMATICS	STUDENT PROGRESS				
MATHEMATICS	MATERIALS				
CAREER EDUC.	STUDENT PROGRESS				
ESL	STUDENT PROGRESS				
CULTURAL ACTIVITIES	PROGRESS				
MUSIC	STUDENT PROGRESS				
ARTS/CRAFTS	STUDENT PROGRESS				
MEDICAL PROGRAM	PROGRESS				
DENTAL PROGRAM	PROGRESS				
PHYSICAL EDUCATION	STUDENT PROGRESS				
NATURAL SCIENCE	STUDENT PROGRESS				
SOCIAL STUDIES	STUDENT PROGRESS				
NUTRITION EDUCATION	STUDENT PROGRESS				
SPECIAL EDUCATION	STUDENT PROGRESS				
FOOD SERVICE	OPERATIONS CONTROL				
TRANSPOR- TATION	OPERATIONS CONTROL				

PROGRESS REPORTING SYSTEM CALENDAR

COMPONENT	ACTIVITY	MONITORING DATE	STATUS		DEVIATION IDENTIFIED
			OK	NOT OK	
BILINGUAL EDUCATION	STUDENT PROGRESS				
MSRTS	RECORDS PROGRESS				
SKILLS INFOR- MATION SYSTEM	RECORDS PROGRESS				
PARENT IN- VOLVEMENT	ACTIVITIES, MEETINGS				
CONTACT/RE- CRUITER LOGS	RECORDS PROGRESS				
PROGRAM VISIBILITY	PROGRESS				
STAFF EVALUATIONS	PROGRESS				
STAFF DEVELOP- MENT	PROGRESS				
STUDENT ATTENDANCE	PROJECTIONS				
CONTENT AREA PROGRESS	LESSON PLANS				
MATERIALS	QUANTITY, QUALITY				
EQUIPMENT	QUANTITY, QUALITY				
FIELD TRIPS	NUMBER, COST				
DAILY SCHEDULE	EFFEC- TIVENESS				
COMMUNI- CATION	TEACHER HOME VISITS				
COMMUNI- CATION	PARENT CON- FERENCES				
PLAYGROUND DUTY	SUPERVISION EFFECTIVENESS				
OVERALL BUDGETING	EXPENDITURE CONTROL				
MEDIA UTILI- ZATION	QUANTITY, QUALITY				
RECREATION ACTIVITIES	TYPE, QUALITY				

PROGRESS REPORTING SYSTEM CALENDAR

[illegible]

Lesson 10 -- Problem-Solving Through Management Action

OVERVIEW

This lesson presents procedures for analyzing the cause of problems and examining various alternative solutions. A rationale for weighing alternatives is given such that one alternative solution is indicated over the others.

OBJECTIVES

The participant should be able to:

- establish a set of needs/likes criteria useful in the selection of an alternative
- develop alternative courses of action for dealing with a deviation from the plan
- act upon the information secured for each alternative and choose the alternative most likely to remedy the problem situation or deviation from plan.

ABSTRACT

The solution of a problem which occurs during the operation of a project involves the determination of the cause of the problem, the generation of alternative solutions, and the selection of a "best" solution.

CONTENT OUTLINE

- A. Management action for the identification and solution of problems relies on:
 1. Determining a likely cause for the problem
 2. Developing ideas useful in analyzing the cause
 3. Determining what corrective or adaptive action would be most appropriate
- B. Problem-solution centers upon a decision concerning alternative means to alleviate the problem (deviations).
- C. Alternative solutions for resolving the problem are developed by:
 1. Determining time, cost, performance trade-offs
 2. Altering goals or plans to fit the actual conditions

- D. The alternative which offers the highest likelihood of solving the problem is selected on the basis of:
1. Evaluation of each need
 2. The set of consequences surrounding each alternative

Lesson 10 -- Text

Determining Problem Cause

After having identified a deviation, the project director must fully investigate all aspects of the problem in order to determine why it has occurred. In most cases a deviation occurs because of some unplanned or unanticipated change. Some examples of unplanned or unanticipated changes are staff illness, staff conflict, late arrival of materials and supplies, arrival of materials and supplies of the wrong type, or inability of the staff to perform at the expected level.

If the project manager cannot readily identify the situation that caused the deviation, several alternative ideas regarding what changes may have occurred can be developed. Once the project manager has generated a seemingly complete list of statements of the probable causes, the project manager tries to eliminate each statement by asking if the stated unplanned situation could result in the reported deviation. That is, would it cause what is observed and nothing more? By this process of elimination, the project manager is able to determine the cause of the deviation or problem.

Problem Solution

After determining the cause of a problem, the project manager must develop a solution to the problem. One alternative is to eliminate, if possible, the cause. If he cannot eliminate the cause, he must then try to minimize the effect of the cause by taking some type of adaptive action which reduces the significance of the immediate deviation, or problem, and possible future deviations. In either case, the project manager must make a decision on the appropriate course of action to correct the deviation. Decision-making consists of specifying the result that must be achieved, developing alternative sources of action to achieve the result, and selecting the most desirable alternative by using criteria of advantages and disadvantages.

Specifying Results

The project manager and staff must first specify the results or ends they want to achieve. In specifying the ends, the project manager must detail both the results expected and the resources available for carrying out the corrective course of action. By paying attention to details, it will be easier to develop alternative courses of action to satisfy the ends. In order to achieve specificity, the project director can ask: What are the absolute minimums of the situation (needs), and what items do I want to include (likes)?

A "need" represents an absolute necessity which cannot be violated. A "like" is something not absolutely necessary, but quite desirable. Comparing your "needs" and "likes" will allow you to best judge alternatives to the deviation which will best reflect the values needed to remediate the situation at hand.

Developing Alternatives

After the desired ends have been specified for a problem situation, alternative courses of action must be developed. There are usually a number of alternative courses of action that will solve a particular problem, but sometimes there is only one. The project manager should develop as many alternatives as possible. Most of the alternatives will deal with trade-offs. In making these trade-offs, care should be taken not to drastically affect the overall project plan.

In developing the alternative courses of action, the project director should consult the project personnel that are most familiar with the problem. Because of their intimate knowledge of the problem, they can give valuable advice. Sometimes the personnel most familiar with the problem may be "too involved" to fairly judge the situation and give possible solutions. In this situation, it may be advantageous to seek other staff or outside consultants to assist you in generating your alternatives.

Selecting an Alternative

After a number of possible alternative solutions to the problem are generated, the project manager can begin to compare each alternative with his list of "needs". Any alternative which does not satisfy all of the "needs" is deemed unfeasible and is, consequently, rejected. By doing this, your list of alternatives become more manageable! Then, by comparing the list of "likes," the project manager can gain a better perspective on the desirability of each alternative.

Even though one alternative course of action may satisfy all of the "needs" and "likes," the result of selecting that particular course of action may yield undesirable consequences. The project manager must visualize each alternative to the operation of the project and consider any possible effect it might have on the project, and the effect that other events might have on the alternative. The project manager is well advised to ask his staff and others for help with this difficult task. The selection of a "best" alternative will probably be the result of trade-offs among the various advantages and disadvantages of several prospective alternatives.

Activity 1 -- Problem-Solving Action Chart

Time Needed: 30 - 45 minutes (app.)

Materials Needed: - Problem-Solving Action Chart
- Project Plan/Information System Worksheets

Task: This activity will further acquaint you to resolving deviation or problem situations within your project. It is the intent here not to "solve" your problems, but give you an opportunity to "fine-tune" your problem-solving skills.

The Problem-Solving Action Chart provided to you has some "hypothetical" deviations (problems) identified for you. It is your task to generate a list of probable causes, specify the results or ends for the deviation by developing alternatives that indicate "needs" and "likes." Once you have your "needs" and "likes" listed, then you will need to select the "best" alternative while indicating your probable consequences or "trade-offs." The resource-consultants are available to assist you in this activity.

Closure For Lesson 10

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

PROBLEM-SOLVING ACTION CHART

DEVIATION	PROBABLE CAUSES	ALTERNATIVE SOLUTIONS		"BEST" ALTERNATIVE	TRADE-OFFS
		NEEDS	LIKES		
1. LATE ARRIVAL OF SUPPLIES AND MATERIALS					
2. STAFF MEMBER NOT PERFORMING AT EXPECTED LEVEL					
3. PERSONALITY CONFLICT BETWEEN TEACHER AND AIDE					

PROBLEM-SOLVING ACTION CHART

DEVIATION	PROBABLE CAUSES	ALTERNATIVE SOLUTIONS		"BEST" ALTERNATIVE	TRADE-OFFS
		NEEDS	LINES		
4. MEDICAL EXAMINATIONS FOR CHILDREN ARE BEHIND SCHEDULE					
5. HALF OF TEACHING STAFF IS ILL					
6. 25 OLDER STUDENTS ARRIVE FOR "ONE" DAY					

PROBLEM-SOLVING ACTION CHART

DEVIATION	PROBABLE CAUSES	ALTERNATIVE SOLUTIONS		"BEST" ALTERNATIVE	TRADE-OFFS
		NEEDS	LIKES		
7. SCHOOL BUS RUNS OFF ROAD DUE TO RAIN					
8. SCHOOL BUILDING BROKEN INTO DURING NIGHT					
9. "EPIDEMIC" OF MEASLES HITS SCHOOL					

PROBLEM-SOLVING ACTION CHART

PROBLEM	PROBABLE CAUSES	ALTERNATIVE SOLUTIONS		"BEST" ALTERNATIVE	TRADE-OFFS
		NEEDS	LIKES		
10. TRANSPORTATION AIDES NOT AVAILABLE FOR ONE OF YOUR BUSES.					
11. 15 SEVERELY HANDICAPPED CHILDREN (ALL AGES) ENROLL AT YOUR SCHOOL					
12. STUDENT IMPACTION OCCURS DURING LAST WEEK OF SCHOOL					

PROBLEM-SOLVING ACTION CHART

DEVIATION	PROBABLE CAUSES	ALTERNATIVE SOLUTIONS		"BEST" ALTERNATIVE	TRADE-OFFS
		NEEDS	LIKES		
13. STAFF MEMBER INFORMS NEWSPAPER THAT YOUR SCHOOL IS SERVING ILLEGAL ALIENS					
14. OVER-EXPENDITURE OCCURS IN STAFF SALARIES					
15. PROJECT PRINCIPAL RESIGNS AFTER THE THIRD WEEK OF CLASSES.					

Lesson 11 -- Implementing Changes in Project Operations

OVERVIEW

This lesson is concerned with the implementation of the selected solutions of deviations (problems) that have occurred. Emphasis is given to developing the implementation plan and the need for informing management and staff of changes made.

OBJECTIVES

The participant should be able to:

- devise an implementation plan for a given decision
- identify actions needed to insure successful implementation of a given solution
- identify information that should be provided to management and staff about implementing a given decision

ABSTRACT

After selecting action to be taken to solve a problem, it is necessary to implement it. Such action must plan for consequences and include control, reporting procedures, and detailed staff instructions. Information must also be provided to management about the changes made.

CONTENT OUTLINE

- A. An implementation plan is needed for the action and the changes in a project.
- B. The project manager should use planning in developing the implementation plan.
- C. The project staff must be informed of the actions and the changes.
- D. The management must be informed of the project progress problems and solutions.
- E. The project manager must follow through on action implementation.

Lesson 11 -- Text

This lesson is concerned with the changes made in project operations due to deviations that have occurred during the life of the project.

Implementation Plan

Once a "best" alternative course of action is selected, the project manager must implement the action specified. In order to carry out this decision, an implementation plan should be prepared that details the corrective action that is to take place. It is advisable that the project manager follow the same general thinking that he used in the planning phase of this training module to create an implementation plan.

The implementation of a given problem can cause changes in future project operations. Such changes could include:

- changes in the overall goals and objectives
- changes in one or more major task(s) of the project
- changes in the work breakdown structure
- changes in the task sequence of the project
- changes in the project daily schedule
- changes in personnel
- changes in resources
- changes in the project budget and expenditure plan

After specifying the action and identifying the changes to the project, the project manager should determine the responsibilities of each staff member in carrying out the proposed corrective action. He then must specify these responsibilities in detail and incorporate them into the implementation plan. In conjunction with these new responsibilities, the project manager should detail or think through the direction and guidance he will give to his staff for carrying out their responsibilities effectively.

Once the project manager starts to implement the decision, adverse consequences considered earlier in the decision-making process become potential problems. Consequently, the following questions should be answered as the last step in developing the implementation plan:

1. What are the potential problems in implementing this course of action?
2. What are the possible causes of each problem?
3. How can the potential problems be prevented or their effects minimized?

Staff Communication

The information contained in an implementation plan must be communicated to the project staff. The project manager should inform his staff of the action that is to take place and their responsibilities in carrying it out. A report to the management should contain a description of the deviation which exists, the cause of the deviation, the alternative courses of action that have been generated to alleviate the deviation, the selected course of action, the reasons for the selection of that course of action, and the implementation plan for the selected course of action.

Execution

In the execution of the action described in the implementation plan, it is the project manager's responsibility to make sure that the plan is carried out fully and efficiently. He must verify that the responsibilities designated in the plan are understood by the project staff.

The project manager must also follow-up on the directions given to the staff to assure that they are followed. Establishing this method for follow-up will give the project manager early warning if the execution of the action is running into difficulty.

Most deviations are elementary in nature and can be corrected easily. The project manager should be prepared, however, for situations that might create a great deal of anxiety for himself and his staff.

Activity 1 - Implementing Changes in Project Operations

Time Needed: 30 - 45 minutes (app.)

Materials Needed: - Problem-Solving Action Charts
- Plan Implementation Sheet

Task: Utilizing the Problem-Solving Action Charts completed in Lesson 10, take five deviations from the Charts and develop an implementation plan for each deviation. Use the Plan Implementation Chart provided for you with this activity. The resource-consultants are available to assist assist you with the activity.

Closure for Lesson 11

If you are unable to complete the lesson, consider the following items to assist you:

1. Area of concern sheets
2. Schedule a meeting with appropriate staff to complete the lesson
3. Seek other resources at the training session or on an individual basis so that you can complete the lesson.

PLAN IMPLEMENTATION SHEET

"BEST" ALTERNATIVE SELECTION	EFFECT ON PROJECT (✓)								STAFF RESPONSIBILITIES (✓)		COMMUNICATION TO:		FOLLOW-UP (DATE, METHOD, REPORTING PROCEDURE, ETC.)							
	Goals/Objectives	Major Tasks	Work Breakdown Structure	Daily Schedule	Personnel	Resources	Budget	Expenditures	Other	Management	Manager	Teacher	Aide	Secretary	Cook	Drivers	Other	Staff (Date)	Management (Date)	
84																				
85																				

Lesson 12 -- Project Termination

OVERVIEW

This lesson deals with the planning of activities that are directed at closing out or terminating the project.

OBJECTIVES

The participant should be able to:

- explain principles of management connected with closing out a project
- identify the set of activities required in terminating a project
- develop a project termination plan

ABSTRACT

When nearing the end of a project the project manager initiates the activities of closing out the project. A plan for these termination activities is required to ensure that all operations of a project receive satisfactory closure.

CONTENT OUTLINE

- A. Project termination is the last phase of the project management mission.
- B. Various project activities are undertaken during project termination
- C. A phase-out or transition plan is needed for orderly termination
- D. There are some "termination problems" for the project manager to be concerned about.

Lesson 12 -- Text

Every project, by definition, has a finite life. A project ends when goals and objectives are reached, when an end product is produced, or when the time available for the project no longer exists. Three basic situations arise when talking about ending a project. Phase-out generally refers to closing out the project when the goals and objectives are reached.

Termination, although generally referring to the ending of a project, can also be used to refer to the specific case of the stopping of the project effort even though not all contractual conditions have been met. Transition refers to the case where a project effort or end product is institutionalized into an existing structure and becomes an on-going operation or program.

Transition/Phase-Out Plan

Regardless of whether a project is involved in transition or phase-out, the project manager must give attention to several items. Among these are:

- informing project personnel of phase-out or transition procedures
- arranging for the disposition of project equipment and facilities
- preparing and writing the final reports for the local and state educational agencies
- determining which records, reports and similar documents are to be returned and/or sent to designated agencies
- arranging for the transfer of permanent project personnel and the termination of temporary personnel
- making arrangements for the payment of outstanding bills
- reviewing all support contracts to be sure that all conditions have been met or satisfactory arrangements made
- supervising the orderly completion of remaining project activities and operations

In order to insure that these activities are performed, a plan for project transition or phase-out should be prepared in advance of the completion of the project. The time to develop such a plan will vary according to the size and scope of project operations.

Personnel Disposition

Even though staff are aware of their time-employment limitations, there may still be anxiety expressed by the staff at termination time. Thus, it is necessary to maintain a relaxed (yet functional!) atmosphere during this time. Some staff members will need to be transferred back into their regular operational positions. Efforts to inform temporary staff of other job possibilities should be made so that these staff

members aren't totally left "out-in-the-cold." Therefore, consider the "human" elements of this activity and remove as many "psychological effects" as you can.

Facilities and Materials/Equipment Disposition

Having an early "handle" on this will relieve many tension headaches as you terminate your project. Information should be specified for each item regarding its location, current condition, when it will be available, and any limitations on use. Coordinating your efforts with regular building personnel will expediate the process of returning the facilities back to their original status. If your project has its own equipment and materials, it will be necessary to inventory and store those items in a location where future personnel will have access to them.

Final Reporting

All local and state reports required of the project must be completed by project termination time (or shortly thereafter). If you plan ahead as to what will need to be completed, your efforts in doing so will be greatly reduced if you involve as many staff as you need to share these reporting duties.

The project manager must be knowledgeable in not only what reports will be done, but also must know who will get those reports and where they will be retained or sent. Thus, identify as early as possible all reports that you will need to complete. Examples might include: all contract agreements, budget expenditure reports, personnel files, travel reimbursements, original test data, correspondence or memos noting major project changes, attendance reports, medical/dental/academic data for students, progress and final reports, etc.

Activity 1 - Project Termination Plan

Time Needed: 1 - 2 hours (app.)

Materials Needed: - Project Termination
- Plan Checklist
- all required state and local reporting forms

Task: This activity is designed to give you an opportunity to plan out procedures for project termination. The checklist is only a sample and may not include all activities that your project will identify for termination. Use this checklist as a guide for planning your termination activities. The resource-consultants are available to assist you with this activity.

PROJECT TERMINATION PLAN CHECKLIST

<u>ACTIVITY</u>	<u>RESPONSIBILITY (WHO?)</u>	<u>PROJECTED COMMENCING DATE (DAY OR WEEK)</u>	<u>ENDING DATE</u>	<u>LOCATION (if app.)</u>
1. <u>STAFF DISPOSITION</u>				
a. TEACHERS	_____	_____	_____	_____
b. AIDES	_____	_____	_____	_____
c. SUPPORT STAFF	_____	_____	_____	_____
d. OTHER AGENCY FUNDED STAFF	_____	_____	_____	_____

72

DO YOU NEED A "TRANSITION" TEAM (SUMMER TO REGULAR)		
<u>TITLE</u>	<u>LENGTH OF TIME NEEDED</u>	<u>RESPONSIBILITIES</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

OTHER INFORMATION: _____

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
2. <u>FACILITIES AND EQUIPMENT/ MATERIALS DISPOSITION</u>				
a. Building (includes physical inventory, release procedures, etc.)	_____	_____	_____	_____
b. PROJECT EQUIPMENT:	_____	_____	_____	_____
1. Inventoried? <u>Y</u> <u>N</u>	_____	_____	_____	_____
2. Checked for condition?	_____	_____	_____	_____
3. Storage available	_____	_____	_____	_____
4. Accessible?	_____	_____	_____	_____
c. Borrowed Equip- ment/Materials: (includes desks, chairs, file cabinets, type- writers, etc.)	_____	_____	_____	_____
1. Inventoried? <u>Y</u> <u>N</u>	_____	_____	_____	_____
2. Checked for condition?	_____	_____	_____	_____
3. Returned to app. place?	_____	_____	_____	_____
4. Accessible?	_____	_____	_____	_____

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
d. PROJECT MATERIALS:				
	<u>Y</u> <u>N</u>			
1. Inventoried?	-- --	_____	_____	_____
2. Checked for condition?	-- --	_____	_____	_____
3. Ready for storage?	-- --	_____	_____	_____
4. Accessible?	-- --	_____	_____	_____
74 e. Equipment/Materials Storage Facility:	<u>Y</u> <u>N</u>			
1. Available?	-- --	_____	_____	_____
2. Delivery arrangements made?	-- --	_____	_____	_____
3. Staff needed?	-- --	_____	_____	_____
4. Accessible?	-- --	_____	_____	_____

3. FINAL REPORTING

NOTE: IDENTIFY ALL
REPORTING PROCE-
DURES AND FORMATS

a. Instructional
Components

93 Area: _____

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
1. Test results				
2. Student Profiles				
3. Class Profiles				
4. Other				
Area: _____				
1. Test results				
2. Student Profiles				
3. Class Profiles				
4. Other				
Area: _____				
1. Test results				
2. Student Profiles				
3. Class Profiles				
4. Other				

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
Area: _____	_____	_____	_____	_____
1. Test results	_____	_____	_____	_____
2. Student Pro- files	_____	_____	_____	_____
3. Class Pro- files	_____	_____	_____	_____
4. Other	_____	_____	_____	_____
Area: _____	_____	_____	_____	_____
1. Test results	_____	_____	_____	_____
2. Student Pro- files	_____	_____	_____	_____
3. Class Pro- files	_____	_____	_____	_____
4. Other	_____	_____	_____	_____
b. Medical/Dental Components	_____	_____	_____	_____
Medical:	_____	_____	_____	_____
1. Forms	_____	_____	_____	_____
2. Materials/ Supplies	_____	_____	_____	_____
3. Other	_____	_____	_____	_____
Dental:	_____	_____	_____	_____
1. Forms	_____	_____	_____	_____
2. Materials/ Supplies	_____	_____	_____	_____
3. Other	_____	_____	_____	_____

76

97

98

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
c. Food Services				
1. Forms				
2. Support (lunch counts, menus etc.)				
3. Outside con- tracts?				
d. Transportation:				
1. Forms				
2. Support Data				
3. Contract Closure				
e. Family Contact/ Recruiter				
1. Logs				
2. Support Data				
3. Transition Support (see # 1)				
f. MSRTS				
1. White Shadows (A/M)				
2. Skills Informa- tion System				
3. Other:				

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
g. Financial				
1. Reporting to State				
2. Local Expenditure Summary				
3. Outstanding Bills				
4. Final Payments to Staff				
78 h. Attendance:				
1. Local forms				
2. State Procedures:				
CDE 120				
MSRTS				
i. Project Information:				
1. Local program evaluation				
2. Lesson Plans				
3. Handbooks				
4. Projected requests for materials				
5. Other:				

PROJECT TERMINATION PLAN CHECKLIST

ACTIVITY	RESPONSIBILITY (WHO?)	PROJECTED COMMENCING DATE (DAY OR WEEK)	ENDING DATE	LOCATION (if app.)
4. OTHER ACTIVITIES				
a. _____	_____	_____	_____	_____
b. _____	_____	_____	_____	_____
c. _____	_____	_____	_____	_____
d. _____	_____	_____	_____	_____

79

Glossary of Project Management Terms

ACTION, ALTERNATE COURSE OF (ALTERNATIVE) -

A proposed management action that may be selected for implementation to correct a deviation.

ACTION, CORRECTIVE -

Management action that can be implemented to correct the cause of a deviation.

ACTION, ADAPTIVE -

Management action that can be implemented to minimize the effect of a course of action if the cause cannot be corrected.

ADMINISTRATION -

A process involving the execution of management decisions within an organizational framework utilizing pre-established rules for decision-making.

ANALYSIS -

The process of breaking a total into its constituent parts and examining these parts to determine their nature, proportion, function, and interrelationships.

AUTHORITY -

The right to act, to make decisions, or to command others.

BUDGET -

The expression in financial terms of management plans for funding a project over a specific time period.

CONSEQUENCES -

The negative effects of implementing a given course of action. They should be identified and the probability of their occurrence should be determined before fully accepting a given course of action.

CONTROL -

Basically a problem-solving process involving three steps--problem identification, problem solution and solution implementation; in project management terms, deviation identification and analysis, decision-making through alternative creation, and selection and alternative implementation.

CRITICAL PATH -

The longest or most time consuming pathway within a network of various paths relating the activities required between the start and finish of the project.

DECISION-MAKING -

Identifying and selecting from possible alternative courses of action the best possible course of action.

DEVIATION -

A difference between a planned situation and an actual situation, a project management problem.

DIRECTING -

Primarily a process of motivating employees to accomplish their tasks. It requires the establishment of an environment conducive to accomplishing effort.

DIRECT COSTS -

Costs for those resources obtained especially for the activity or project tasks and necessary for its completion.

ENDS (RESULTS AND RESOURCES) -

The first consideration and the objectives in decision-making. The specification of what one wants to accomplish and the identification of the resources that are to be utilized.

EVENT -

A definable point in time where some action or activity begins or ends. It is a recognizable instant in time which does not consume time or resources. Usually identified in network management systems by a circle.

EXPENDITURE PLAN -

A set of planned decisions concerned with financial outflow and answering questions such as:

- What is to be purchased?
- When is the item to be ordered?
- Where is the item to be purchased?
- What weekly or monthly rate is to be used for the item?
- How is the item to be purchased?

GEAR-UP PHASE -

The activities involved in the period after approval of the proposal and before the project operational activity phase. Consists of bringing together resources necessary to start the project operational phase, and identifying and establishing policy and procedures, and creating the project information system.

GOAL -

A broadly stated end point to be reached in the future. In the project, a goal is a collective activity, identified and the end product, and is at the top level of hierarchical work breakdown structure.

HANDBOOK, PROJECT -

A formal or informal document containing basic information about project goals and tasks, policy statements and procedures guidelines, organizational relationships, and similar items for use by project manager and personnel in day-to-day operations of the project.

INDIRECT COSTS -

Costs accounted to a project which are often pro-rated since they cannot be adequately identified with a costing unit. Examples are heat, electricity, and other general facilities which are shared with the organization in which the project is housed.

MANAGEMENT -

The method of attaining organizational goals by 1) developing a plan; 2) arranging operations in conformity to the plan; and 3) creating an environment which is favorable to the performances of the people belonging to the organization. It is a process which involves a high degree of uncertainty and unprogrammed decision-making.

MOST LIKELY TIME -

The estimated average time needed to complete an activity based upon some experience with a similar activity.

"NEEDS" -

Those ends or decision-making objectives that must absolutely be satisfied by any acceptable course of action.

NETWORK (FLOW DIAGRAM OR WORK FLOW) -

Consists of interrelated activities and events which must be accomplished to reach the project goal. The flow diagram shows the planned sequences of accomplishment, interdependencies, and inter-relationships of activities and events.

OBJECTIVE(S) -

Statements which specify a desired outcome. The statement can be one which includes a broad area of concern or need or it can specify an extremely narrow concern. Goal, mission, and task statements attempt to redefine objectives depending on the extent of concern from broad to narrow.

OPTIMISTIC TIME -

The time estimated for the completion of an activity when it is assumed that everything will go extremely well.

ORGANIZING -

The establishment of an integrated system of authority and responsibility relationships in which the members know what their tasks are and how they fit into the scheme and have the requisite authority and responsibility to accomplish these tasks.

PHASE-OUT -

Closing out the project when the objective or end product is realized or accomplished.

PLAN, IMPLEMENTATION -

A structured document to aid the project manager to implement a selected course of action.

PLANNING -

A process of determining objectives, defining and evaluating alternative courses of action, and selecting the course which will most effectively and efficiently achieve the established objectives.

PESSIMISTIC TIME -

The time estimated for the completion of an activity when it is assumed there will be difficulty, the task is uncertain, or there is unfamiliarity with the task.

POLICY -

A policy is a general statement or rule which guides or channels thinking in decision-making. It can be formally stated or a result or practice over time.

PROBLEM -

Deviation from a plan or a variance between what is and what is desired.

PROBLEM ANALYSIS -

The process of identifying and defining a deviation from plan and determining its specific cause.

PROCEDURE -

Guide to routine actions emphasizing a chronological sequence. Practices which are so re-current and routine as to lend themselves to formalized response.

PROGRAM -

A complex of policies, procedures, rules, tasks, resources, and associated elements necessary to carry out a given course of action.

PROGRAMMED DECISION -

Decisions which are basically repetitive, routine and procedural and where the decision rule is pre-determined.

PROJECT -

A set of interrelated and interdependent tasks that have to be accomplished to reach an objective or objectives within time, cost, and performance specifications and possessing a degree of uncertainty of how to achieve the goal.

PROJECT DEFINITION -

A process which involves the development of explicit statement of the project's primary objective goal and the necessary sub-objectives to reach the major goal. The development of a work breakdown structure is used as one technique in defining the project.

PROJECT MANAGER -

The one individual who is responsible for the successful accomplishment of a project.

PROJECT MANAGEMENT PHASES -

- . Planning
- . Gear-up/Implementation
- . Operational Control
- . Termination

ORGANIZATIONAL CHART -

Subdivision of major functions into smaller supporting functions with a delineation of specific responsibilities and authority for or at each level.

PROJECT TRANSITION -

The termination of the project where the results are phased into operational use or into another project.

REPORT, FINAL -

A formal report, usually required by the contractor, which documents the efforts of the project in accomplishing its goals and objectives.

REPORT, PROGRESS -

A report describing the progress of the project utilizing the project plan to indicate events and activities completed, to describe the activities in progress and to reconsider the events and activities in the future.

REPORT, STATUS -

A report that indicates the current status of the project so that one can compare it to the project plan.

RESOURCE ALLOCATION -

Translating an approved plan into a schedule by assigning resources to accomplish the planned activities during a specific calendar period. The process of applying resources toward the accomplishment of a plan, procedure, policy, tactic, or strategy.

RESPONSIBILITY -

The obligation to use granted authority to direct that effort which is necessary to be performed according to plan.

SYSTEM, PROJECT MANAGEMENT INFORMATION -

A system that stores and provides management information for project decision-making utilizing the project plan and the project reporting system.

SYSTEM, REPORTING -

A system of transmitting information utilizing reports so that the actual project situation can be compared to the planned project situation.

TASK -

A task, or in some cases a sub-task, is the smallest unit of action. A task is a single activity or an element of a work package which uses a single person of the staff and little resources and is at the lowest level of hierarchical work breakdown structure.

TASK RESOURCE SCHEDULE -

A tool or device which is used to identify, estimate quantity, and schedule the resources which support a specific task.

TERMINATION -

Stopping of effort due to a lack of funds, failure to meet contract conditions, or similar reason, before project objectives reached.

TRANSITION -

Institutionalizing the end product of a project or absorbing the effort into an existing organizational unit.

UNPROGRAMMED DECISIONS -

Decisions which deal with unstructured, novel and consequential issues and for which there are no pre-determined rules.

LESSON 3 -- DEVELOPING A WORK FLOW

SUGGESTIONS FOR TASKS IDENTIFICATION

READING

Testing Program
Using Test Scores for Inst.
Series Selection
Supplementary Materials
Student Profiles

CAREER EDUCATION

Materials
Resources
Activities
Participating Students
Facilities

MUSIC

Materials
Resources
Equipment
Participating Students
Facilities

MEDICAL/DENTAL

Personnel
Facilities
Records
Scheduling
Integration of Services

PHYSICAL EDUCATION

Personnel
Facilities
Equipment
Scheduling
Integration of Services

SPECIAL EDUCATION

Resource Coordination
Personnel
Facilities
Staffing
Equipment

MATH

Testing Program
Using Test Scores for Inst.
Series Selection
Supplementary Materials
Student Profiles

ESL

Materials
Resources
Activities
Student Identification
Facilities

ARTS/CRAFTS

Materials
Resources
Equipment
Participating Students
Facilities

FOOD SERVICES

Personnel
Facilities
Records
Scheduling
Integration of Services

RECREATION

Personnel
Facilities
Equipment
Scheduling
Integration of Services

TRANSPORTATION

Vehicle Availability
Personnel
Contracting
Scheduling
Delivery Services

LESSON 3 (CONT.)
SUGGESTIONS FOR TASKS IDENTIFICATION

RECRUITMENT

PROCEDURES
AREA COVERAGE
PERSONNEL
ROLE RESPONSIBILITIES
RECORDKEEPING

PARENT INVOLVEMENT

FAMILY NIGHTS
INSTRUCTIONAL INVOLVEMENT
PARENT COUNCILS
PROGRAM PLANNING ASSISTANCE
HOME/SCHOOL COMMUNICATION

ADMINS. DETAILS

COMMUNICATION NETWORK
SPENDING POLICIES
PROGRAM TO DIST. COORDINATION
STAFF HIRING/DEVELOPMENT
DAY-TO-DAY OPERATIONS

COMMUNITY COORDINATION

SERVICES AGENCIES
COMMUNICATION
FACILITIES TO USE
ACTIVITIES INVOLVEMENT
VISIBILITY STRATEGIES

"NOTEWORTHY" INFORMATION FOR YOUR PROGRAM COMPONENTS

READING:

- Preparation towards securing student information prior to the start of your program will not only keep you "one step ahead" in your office, but will also alert the teacher to specific needs of children before the first day of school.
- Utilize existing information on students to simplify testing at the beginning of the program. Some students attending your school may have been in your area during the regular school year and therefore should have testing information in their student cumulative files. Interstate children should have skills list information so that placement into classroom content area instruction will be easier. If you do need to test, try to test with an instrument that is relevant to the children your are serving, reflects the time frame you have for your summer program and not something that has been validated by students far removed from the migrant lifestyle. Criterion-referenced tests work well as they test knowledge of objectives of the individual and seem to be culturally fair.
- Prescribe activities that will allow students to use their strengths to correct deficiencies.
- Use the environment of the classroom to the fullest. Allow for learning centers, small group work, individual student work areas, and whole class learning for optimum classroom instruction.
- Base your activities on student needs and teacher needs (morale is important!).
- Encourage field trips as part of your instructional programs. Make sure they are valuable to what is being taught in the classroom and are integrated into the content areas.

MATHEMATICS:

- Preparation towards securing student information prior to the start of your program will not only keep you "one step ahead" in your office, but will also alert the teacher to specific needs of children before the first day of school
- Utilize existing information on students to simplify testing at the beginning of the program. Some students attending your school may have been in your area during the regular school year and therefore should have testing information in their student cumulative files. Interstate children should have skills list information so that placement into classroom content area instruction will be easier. If you do need to test, try to test with an instrument that is relevant to the children your are serving, reflects the time frame you have for your summer program and not something that has been vali-

MATHEMATICS (CONT.):

dated by students far removed from the migrant lifestyle. Criterion-referenced tests work well as they test knowledge of objectives of the individual and seem to be culturally fair.

- Prescribe activities that will allow students to use their strengths to correct deficiencies.
- Use the environment of the classroom to the fullest. Allow for learning centers, small group work, individual student work areas, and whole class learning for optimum classroom instruction.
- Base your activities on student needs and teacher needs (morale is important!).
- Encourage field trips as part of your instructional program. Make sure they are valuable to what is being taught in the classroom and are integrated into the content areas.

CAREER EDUCATION:

- Prescribe activities that will allow students to use their strengths to correct deficiencies.
- Encourage field trips as part of your instructional program. Make sure they are valuable to what is being taught in the classroom and are integrated into a variety of content areas.
- Coordinate your activity efforts with those that have been identified by school districts participating in your summer program. Many districts have guidebooks for career education at a variety of grade levels.
- Encourage local businesses to provide career opportunities for migrant children. How about a summer career fair at your school?
- Don't forget state-wide resources for career education (State Resource Center, nearby colleges and universities, libraries, etc.)!

MUSIC:

- Use the classroom environment to the fullest. Allow for learning centers, small group work, individual work areas, and whole class learning for optimum instruction.
- Will the local symphony be putting on a performance in your town?
- Do any of the participating school districts have some instruments that you can borrow for some "hands-on" learning?
- Your local music store may have some ideas for activities. Maybe they might donate some old equipment for the kids to use!

ARTS/CRAFTS:

- Use the environment to the fullest. Allow for learning centers, small group work, individual student areas, and whole class learning for optimum instruction.
- Will you have access to arts and crafts facilities for your program?
- Sometimes the community college or a local crafts shop will allow you to use their kilns if you have some pottery that needs to be fired.
- How about bringing in some local talent for the kids to watch?
- Don't forget senior citizens! They have a lot to share with the kids!

MEDICAL/DENTAL:

- Your medical and dental students are a part of your total school program and need to be treated as such. Use them to help you provide better information to teachers, students and parents. Encourage the health students to make home visits with family contacts.
- Medical and dental students are maintaining individual and cumulative student records. Make sure you are aware of their location as well as setting policies concerning who has access rights.
- Don't forget the health people when planning family nights!
- How about letting the nutritionist plan the snacks with the cooks?
- Establish student screening schedules as early as you can so that minimal interference occurs with your instructional program. However, keep in mind that the health program is just as important as other components and deserves effective planning and cooperation from all involved.

FOOD SERVICES:

- Monitor your food and nutrition programs as often as possible. Make sure that meals are adequately balanced as required by law. Look for dishes that students are regularly not eating and insist that they not be made as waste will continue to occur. Try to include cultural foods of all kinds.. Use your food program as an integral part of student instruction.
- Is it possible for the kids to watch the cooks prepare the food as a learning activity?
- Keep the cooks informed should your daily schedule change or if you plan to have any all-school field trips. They will need to make necessary adjustments in meal menus.

PHYSICAL EDUCATION:

- Ensure that student growth is the priority for your P.E. program. There should be structure so that students have learning opportunities (goals and objectives) every time they attend this class.
- Please don't mistake P.E. for student recreation. They are very different when it comes to planning activities. Your instructor needs to be certified in case there are any injuries.
- You may want to have the P.E. instructor plan activities for students during recess. This could be a cooperative venture with classroom teachers.
- If you have a swimming program, stress swimming instruction and water safety, not "fun-in-the-pool."

RECREATION:

- These are activities above and beyond your regularly scheduled program activities. They need adequate supervision as well as thoughtful planning.
- Check to see if your city or county is offering summer recreation activities that migrant children may be able to become involved with. How about having a summer school bowling, softball, soccer, etc. team to participate in the recreation leagues?
- Is it possible to schedule some recreational activities during rainy days for older students?
- Don't forget a recreational component on family nights!

SPECIAL-EDUCATION:

- Students with special needs should receive classroom instruction with the other students if at all possible. Help teachers in identification of special needs students and work with local agencies that can assist you in providing better learning experiences for these children.
- Do your best to follow established staffing procedures for special needs children. Communicate with local special education programs for activities and materials.
- Inform your Family Contacts about the services available at your school for special needs children so they can provide this information when recruiting students.

ENGLISH AS A SECOND LANGUAGE:

- Make an early determination on how your project intends to identify ESL students.
- Do your best to integrate ESL activities into all other instructional component areas.

ENGLISH AS A SECOND LANGUAGE (CONT.):

- How about considering an intensive ESL class as a "special" component beyond your regular ESL activities in the classroom?
- Prescribe activities that will allow students to use their strengths to correct deficiencies.
- Encourage field trips as part of your instructional program. Make sure they are valuable to what is being taught in the classroom and integrated into a variety of content areas.
- It is the goal of migrant programs to assist the child in surviving in the public schools. Therefore, focus on the language that allows the child to acquire skills and concepts in the quickest and easiest manner. Make sure you have staff who can/will provide opportunities to learn in the child's language as well as providing instruction in a second language.

TRANSPORTATION:

- Establish policies on the scheduling of field trips and be firm with implementation of these policies.
- Schedule a meeting with bus drivers as soon as the Family Contacts determine where the families are located. Bringing both groups together will insure that the drivers know where the students live!
- Make sure drivers understand the "line-of-authority" with your program. They need to know where to go should any problems arise.
- Don't forget about adequate supervision for babies and small children on the buses! The drivers can only hold so many kids at one time!
- Who's responsible for discipline problems on the buses?
- Let the drivers know as soon as possible should any changes occur in your daily schedule. You can't possibly imagine how much fun you will have when the buses don't arrive on time!
- If you use buses for Family Nights, don't forget to invite the drivers in on the fun!

IDENTIFICATION AND RECRUITMENT:

- Utilize your Family Contacts as liaisons between the home and school. Be alerted to problems students may be having in the school or at home and allow your Contacts to assist you in resolving these situations.
- Require that your staff make home visits with your contact workers. This gives insight of the world in which these children live and can be valuable for classroom instruction. Assuming that a child lives a certain way is tragic when a teacher thinks this is the way things are, rather than knowing how they are. One or two visits to homes is sufficient.

IDENTIFICATION AND RECRUITMENT: (CONT.):

- Encourage the health students to make home visits with Family Contacts.
- Encourage attendance of all pupils! Keep accurate records! Talk to parents when children are not coming to school! Do everything to let children come to your school!
- You may not think so, but the way Family Contacts dress when out recruiting does make a difference! Encourage sensible dressing on the part of your Contacts. Over-dressing is just as bad as under-dressing!
- Your Family Contacts must have flexible scheduling in order to do their job. This requires trust on both sides, management and personnel. There are many ways to put in an eight-hour day than just 8 to 5!

ADMINISTRATIVE DETAILS:

- It is the responsibility of the principal and office staff to assure that information on students is properly maintained. "White Shadows" (academic and medical), Skills Information System checklists, and attendance information are required to be maintained on each student regardless of length of stay with the program. Know what CDE expects you to keep as far as information/reporting forms.
- Proper documentation of student achievement is vital. Preparation towards securing student information prior to the start of the program will not only keep you "one step ahead" in your office, but will also alert the teacher to specific needs of children before the first day of school.
- Utilize existing information on students to simplify testing at the beginning of the program.
- Try to implement individualized instruction in the classrooms. Let the teachers be more facilitators rather than instructors in the classroom. Students work better when they have certain responsibilities. After all, the teachers have plenty of things to do!
- Use the environment of the classroom to the fullest. Allow for learning centers, small group work, individual student work areas, and whole class learning for optimum classroom instruction. Remember, this is a summer program. Alternative teaching strategies should be encouraged!
- Ask the staff to assist you in scheduling the day's activities as much as possible. Their input can make a world of difference in the success of the program if their involvement is viewed as important.
- Have regular or "as-needed" staff functions (planning, "gripe," "support," etc.)

ADMINISTRATIVE DETAILS (CONT.):

- Try to maintain individual student folders which contain academic, testing, attendance and special interests information so that teachers can continually update data on students. Monitoring individual student information will also assist you for the following year should students return.
- Monitor your food and nutrition programs regularly. Identify problem areas and make the necessary changes. Support the staff (LET THEM KNOW!) when things are going well!
- Utilize your Family Contacts as liaisons between the home and school. Be on the alert for any student problems at school or home and allow the contacts to assist you in resolving these situations.
- Encourage field trips as part of your instructional programs. Make sure they are valuable to what is being taught in the classroom and integrated into a variety of content areas. Establish policies on the scheduling of field trips and be firm with implementing them.
- It is the goal of migrant programs to assist the child in surviving in the public schools. Therefore, focus on the language that allows the child to acquire skills and concepts in the quickest and easiest manner. This may mean providing instruction for some children in Spanish rather than English. Make sure that you have staff who can/will provide instruction and learning opportunities in the child's language as well as providing instruction in a second language.
- Require that your staff make home visits with your Contact Workers. This gives instructors insight of the world in which these children live and can be valuable in how instruction will take place in the classroom. One or two home visits would be sufficient. Don't forget yourself!
- Structure your playground/recess activities to further assist you in instruction. The staff on duty should be as active as possible while supervising and should consider games that will allow the children to grow educationally while on the playground. Talk with the P.E. instructor for possible strategies.
- Students with special needs should receive classroom instruction with the other students in the regular classroom, if at all possible. Help your staff in understanding staffing procedures as well as identifying students with special needs.
- Encourage medical and dental students to be a part of the instructional components of your school. Make sure that they are treated as part of the whole program and involved with the learning activities and staff meetings as much as possible.
- Don't try to do everything by yourself! Use other resources to help you as much as possible. Know what resources are available to you locally, regionally, and state-wide.

"NOTEWORTHY..."

- Don't forget to look at coordinating your materials efforts with participating school districts and BOCES. Check out other federal programs and see if they can help you with your materials and equipment needs.
- Form CDE 120 needs to be completed at the end of the program. Use all staff to secure the information to complete this form. With total staff involvement, the task of completing this form will be much easier. Alert your staff to what, why, and how the data will be gathered.
- Make sure that all responsibilities are clearly spelled out to staff prior to opening school. Job descriptions are very helpful and are encouraged. Even as a principal you may not be the director for the program so insist that your role is clearly defined in all areas.
- The length of the school program will greatly depend on the impaction of families in your area. Don't close school down because the staff is tired, the heat is killing you, etc. Do begin looking at closing when the number of students becomes small. There are alternatives (scaling staff size, reducing the number of classrooms, etc) so be alerted to other strategies.
- Let staff know what responsibilities exist for closing the school. Don't excuse some staff early and leave the work for just a few to do. Inventory materials, give back materials borrowed from other sources, arrange classrooms back to their original status, secure materials requests for next year, and check out all classrooms and staff materials before your close. HAVE A PLAN!!
- Determine your pay schedule prior to starting school. Try not to deviate from the schedule unless there are extreme circumstances. Do not give pay advances. Determine your illness policies and holiday policies as well.
- Be responsible for all areas of transportation of students. Don't rely on second-hand information concerning problems. Be on top of the matter yourself! Remember, students arriving and going on the buses are your responsibility.
- Encourage attendance of all pupils. Keep accurate records! Talk to parents when their children are not coming to school. Do everything you can to let students come to your school.

PARENT INVOLVEMENT:

- Encourage parents to provide recipes for your school menus.
- Look at strategies for good home-school communication. Teacher home visits with the family contacts should be arranged at times when the parents wish, not the school.
- Make sure that parents are aware of all services agencies that can assist them while they are in your area. You might want to send a school "newsletter" indicating the types and locations of the service agencies as well as other pertinent information.

PARENT INVOLVEMENT (CONT.):

- Consider some strategies on how you can have parents assist you at school should there be a successive number of "rain days." Sometimes there are older parents traveling with the families. They would be excellent resources for storytelling and multicultural activities. Use parents as classroom volunteers whenever possible.
- Let the parents know what the school expects as far as student attendance is concerned. Work with Family Contacts when problems arise with a child's lack of attendance. There may be some other factors that are not "visible" in regards to this.
- Encourage parents to assist you in planning, implementation, and evaluation of your program through your parent advisory council. Use parent nights to secure input from the parents by having council meetings or input sessions during the course of your evening. Be specific on what you want them to give you feedback on. Avoid "blue-sky" surveys and questionnaires.

COMMUNITY COORDINATION:

- Find out what services are available for migrant families in your area. Establish a communication network with service agencies and the school.
- Use the local newspaper and the radio station to further your efforts in program visibility. Letting the public know of your activities lessens the chances that the community will have negative feelings about what your program is all about.
- Invite the community to visit your school. Let them see that your program is not a babysitting service. Don't isolate the school from community activities--PARTICIPATE!!
- Make sure that any information that is given to the press is cleared through you. Staff members should not take it upon themselves to write articles etc. without your knowledge.
- If your program comes under attack by the community, hold "school-community" sessions so that the public has a chance to express their concerns and so that you have a chance to answer to these concerns. Don't get involved with "on-the-defensive" tactics such as answering letters to the editor that take pot-shots at your program. If you do answer, make sure you give facts, not emotional opinions.
- Let the community know that your school takes pride in its efforts to provide educational services to migrant children. A little PR can go a long way!